Research Product 86-28

Organizational Effectiveness Information System (OEIS) "User's Manual"

Leadership and Management Technical Area
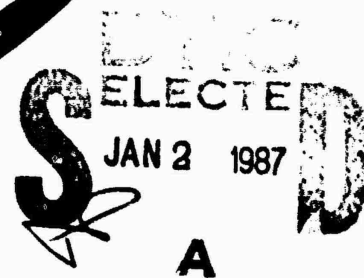**Manpower and Personnel Research Laboratory**

September 1986

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86-12-30-243

U. S. Army Research Institute for the Behavioral and Social Sciences

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OEIS OVERVIEW

The primary purpose of the Organizational Effectiveness Information System (OEIS) is to provide OE Staff Officers (OESOs) with case history information about previous OE Operations, and to provide a capability for producing and scoring surveys for use in ongoing operations. It is anticipated that OE operations will improve because OESOs will be able to capitalize on the successes and to learn from the failures of past operations. The system will also provide OE resource information which can be used by OESOs in the performance of their duties. Finally, the system will provide researchers with a data base containing information for describing potential causal links within OE operations.

The system is composed of three parts:

* The Implementation and Design System (IDS) receives, stores and retrieves OE operation case histories. This portion of the system also includes routines which can be used to perform research on aggregates of cases and management report data.

* The Survey System (SS) maintains a data base or "pool" of survey questions, generates a survey instrument tailored to OESO-provided specifications, and reports the results of the survey after it has been administered. Survey results will also be added to a normative data base of responses for summary or statistical reporting.

* The Resource System (RS) provides personnel and library listings that could assist OESOs. It also contains continuing educational and professional development data and a calendar of planned OE events.

The use and operational characteristics of each of these subsystems is explained in detail in the following chapters of this User's Manual.

NOTE: For ease of presentation the following terms will be used as defined below:

OESO - Organizational Effectiveness Staff Officer. The military consultant responsible for conducting the OE program.

Client - The military organization using the OESO's services.

User - The individual using this manual.

U. S. ARMY RESEARCH INSTITUTE
FOR THE BEHAVIORAL AND SOCIAL SCIENCES

A Field Operating Agency under the Jurisdiction of the Deputy Chief of Staff for Personnel

EDGAR M. JOHNSON
Technical Director

WM. DARRYL HENDERSON
COL, IN
Commanding

Research accomplished under contract
for the Department of the Army

Arthur Young and Company

Technical review by

Paul Van Rijn
Richard Blackburn
William W. Haythorn

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REPORT DOCUMENTATION PAGE		READ INSTRUCTIONS BEFORE COMPLETING FORM
1. REPORT NUMBER ARI Research Product 86-28	2. GOVT ACCESSION NO.	3. RECIPIENT'S CATALOG NUMBER
4. TITLE (and Subtitle) ORGANIZATIONAL EFFECTIVENESS INFORMATION SYSTEM (OEIS) "USER'S MANUAL"		5. TYPE OF REPORT & PERIOD COVERED INTERIM December 1979–December 1984
		6. PERFORMING ORG. REPORT NUMBER --
7. AUTHOR(s) Steven R. Perkins		8. CONTRACT OR GRANT NUMBER(s) MDA 903-80-C-216
9. PERFORMING ORGANIZATION NAME AND ADDRESS Arthur Young and Company 1025 Connecticut Avenue, NW Washington, DC		10. PROGRAM ELEMENT, PROJECT, TASK AREA & WORK UNIT NUMBERS 2Q263743A794 6653
11. CONTROLLING OFFICE NAME AND ADDRESS U.S. Army Research Institute for the Behavioral and Social Sciences 5001 Eisenhower Ave., Alexandria, VA 22333-5600		12. REPORT DATE September 1986
		13. NUMBER OF PAGES 145
14. MONITORING AGENCY NAME & ADDRESS(if different from Controlling Office) --		15. SECURITY CLASS. (of this report) Unclassified
		15a. DECLASSIFICATION/DOWNGRADING SCHEDULE --

16. DISTRIBUTION STATEMENT (of this Report)

Approved for public release; distribution unlimited.

17. DISTRIBUTION STATEMENT (of the abstract entered in Block 20, if different from Report)

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18. SUPPLEMENTARY NOTES
This manual describes the Organizational Effectiveness Information System (OEIS) prototype described in ARI Research Note 84-131. Laurel W. Oliver was the Contracting Officer's representative.

19. KEY WORDS (Continue on reverse side if necessary and identify by block number)
Information system
Organizational effectiveness
Army Organizational Effectiveness (OE) Program

20. ABSTRACT (Continue on reverse side if necessary and identify by block number)
This report contains the manual designed to be used with the prototype Organizational Effectiveness Information System (OEIS) (see ARI Research Note 84-131). The manual describes the Design and Implementation System (IDS), the Survey System (SS), and the Resource System (RS). Although the prototype OEIS was not implemented, this manual documents the details of entering and retrieving Organizational Development (OD) case data, constructing survey instruments from an item pool (as well as permitting the user to add extra items), and generating resource directories of persons, printed documents, and events.

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Organizational Effectiveness Information System (OEIS) "User's Manual"

Steven R. Perkins
Arthur Young and Company

Leadership and Management Technical Area
William W. Haythorn, Chief

Manpower and Personnel Research Laboratory
Newell K. Eaton, Director

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The Army Research Institute for the Behavioral and Social Sciences (ARI) conducted research on the Army's Organizational Effectiveness (OE) program for several years. Some of that research led to the development of this user's manual for the Organizational Effectiveness Information System (OEIS). Although the OEIS was never implemented (because of the phase-out of the OE program), this manual for the prototype system can be a useful reference for persons interested in developing other organizational development (OD) data bases.

EDGAR M. JOHNSON
Technical Director

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CONTENTS (Continued)

ACCESSING THE OEIS

The current OEIS runs on the USAMSSA computer facility located at the Pentagon. It operates under the TSO operating system. To access the OEIS, a user must have a valid user ID and password for this facility. Information on obtaining access to this computer facility can be obtained by contacting the USAMSSA Information Center.

If you have a valid user ID, log onto the USAMSSA computer facility as you would for any other application. After you have successfully logged onto the system the TSO 'READY' prompt will appear. You are now ready to access the OEIS. To access the OEIS, at the 'READY' prompt type:

       EXEC 'WNPU.OEIS.CLIST(OEIS)' (hit the enter key)

The system will now begin loading the OEIS system. You will see the following messages appear on your screen indicating that the system is loading:

   ...ACCESSING OEIS SYSTEM FILES

   ...ACCESSING OEIS LIBRARY FILES

The system will now prompt you for your OESO Identifier. All users of the OEIS must have a valid OESO Identifier. If you do not have a valid OESO Identifier, please contact your system administrator. After entering your Identifier the system will attempt to verify the information. If your OESO Identifier cannot be found in the list of valid users, the system will notify you and ask you to re-enter. This message will appear as follows:

     PLEASE ENTER YOUR OESO IDENTIFIER> xxxxx = (your Identifier)

       VERIFYING OESO IDENTIFIER.....PLEASE WAIT

         * * * ERROR INVALID OESO IDENTIFIER
         * * * PLEASE RE-ENTER

If your OESO Identifier is valid, your screen will clear and the following message will appear indicating that you have entered the OEIS system.

             * * * WELCOME TO * * *
     * * * ORGANIZATIONAL EFFECTIVENESS INFORMATION SYSTEM * * *
             * * * VERSION 1.0 * * *
             * * * JULY 05, 1984 * * *

Three asterisks (***) will appear at the bottom left of your screen. Any time you see these, it indicates that the screen is full. Hit the ENTER key to display the next screen of information. After you hit the ENTER key the main OEIS system menu will appear. It will look like the following:

```
*  *  *  *  *  *  *  *  *  *  *  *  *  *
               OEIS SYSTEM MENU
*  *  *  *  *  *  *  *  *  *  *  *  *  *
```

MENU OPTIONS

---

(1) IMPLEMENTATION AND DESIGN SYSTEM
(2) SURVEY SYSTEM
(3) RESOURCE SYSTEM
(X) EXIT THE OEIS SYSTEM

PLEASE ENTER OEIS SYSTEM OPTION
OR 'M' TO RETYPE MENU>

You may now enter any of the three subsystems of the OEIS by selecting the
option number for that subsystem. After making your selection the appropri-
ate menu for that subsystem will appear. For instructions for using these
subsystems please refer to the appropriate chapters of the User's Manual.

We will examine each of these menu options in the manual. To access the OEIS
Implementation and Design System simply enter a '1' and hit ENTER.

OEIS MAIN MENU - OPTION '1'

IMPLEMENTATION AND DESIGN SYSTEM (IDS)

The IDS is designed to provide the OESO with an automated mechanism for the collection of pertinent historical case information during a current case study. The Implementation and Design System is one of the three major subsystems contained in the Organizational Effectiveness Information System (OEIS). The IDS allows the OESO to store information in a structured format concerning specific aspects of a case study which can then be accessed by other OESOs performing a similar case. A case may be retrieved by other OESOs by supplying a set of selection criteria to be matched against existing cases. Giving the OESO a structured format by which the data is collected and stored also serves to structure the OESO approach to the case study. Each OESO is assigned a unique Identifier by which he/she is identified to the system. All case operations in the IDS system are "tagged" with the OESO Identifier and assigned a unique case number.

In the IDS, a case study is partitioned into six phases. Those phases are Case Initiation, Assessment, Planning, Implementation, Evaluation, and Closeout. In the following discussion, each phase and purpose is described.

Case Initiation Phase

The first phase of a case operation is the initiation of the case within the IDS system. Each new case will be registered and assigned a unique case number. The OESO will collect initiation data such as the client's MACOM, primary mission, the client's original purpose in wanting OE assistance, organization type, post/installation, start date of the operation, and the OESO's Identifier. The assigned case number resulting form case initiation will be the primary means by which that operation's data may be accessed.

Assessment Phase

During the assessment phase, the OESO gathers information concerning the assessment of the client's environment and initial identification of the problem. Based upon this assessment the OESO determines the likelihood of success in the operation.

Planning Phase

In the planning phase the OESO develops his/her plans to resolve the problems identified during the previous assessment as well as the level of support expected from the client's organization.

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Implementation Phase

In this phase the OESO determines the implementation procedures for the plans just developed. In this phase the OESO identifies the roles and involvement levels of the client. The OESO should describe, in detail, the nature of the implementation effort so that other OESOs would understand how the implementation was conducted.

Evaluation Phase

The effectiveness of the OE operation is determined in this phase. The OESO collects information regarding the outcomes (both intended and unintended) of the implementation of his/her solutions to the problems identified during the assessment phase of the operation.

Closeout Phase

During this last phase the OESO officially closes the operation. Upon closing the case the OESO creates an abstract of the case so that other OESOs may review the summary abstract to determine if further information regarding a case would be useful to them and should be retrieved.

Implementation and Design System Procedures

The purpose of this section is to provide the user the functional knowledge required to use the IDS. This section will identify the menus used within the IDS, the options available, and the data to be entered.

Upon entering the OEIS system the user will be prompted for his/her OESO Identifier. The user-supplied Identifier is verified and, if valid, the OEIS banner followed by the OEIS MAIN MENU will appear. Option (1), on the OEIS MAIN MENU will invoke the IDS and will display the IDS Menu shown below.

```
* * * * * * * * * * * * * * * * * * * * * *
       IMPLEMENTATION AND DESIGN SYSTEM
* * * * * * * * * * * * * * * * * * * * * *
```

MENU OPTIONS

```
 (1)  CASE INITIATION
 (2)  UPDATE CASE INITIATION DATA
 (3)  UPDATE ASSESSMENT PHASE
 (4)  UPDATE PLANNING PHASE
 (5)  UPDATE IMPLEMENTATION PHASE
 (6)  UPDATE EVALUATION PHASE
 (7)  CASE CLOSEOUT
 (8)  ADHOC REPORTING
 (9)  UPDATE CASE PASSWORD/ADDITIONAL OESOs
(10)  GENERATE REPORTS
 (X)  EXIT IDS SYSTEM
```

Following is a brief discussion of each of the above options of the IDS system.

OPTION (1) - CASE INITIATION

Option (1) of the IDS Menu allows the OESO to establish a new case within
the IDS system. Each case established by the OESO will be "tagged" with
the OESO's Identifier and will be assigned a unique case number. This
unique case number must be used whenever access to a particular case is
desired. The selection of Option (1) will result in the following display
for data entry.

***** CASE INITIATION / USER DATA ****

```
REVIEW:        --TYPE 'H' FOR HELP - 'D' TO EXIT
PASSWORD:      OESO1:              OESO2:            OESO3:
MTHS AS OESO    OPER BEGIN:         PHASE INVOLVE:
MACOM:          UNIT TYPE:          PRIM. MISSION:
POSITION:       MTHS IN POSITION:              ORG. LEVEL:
--------------------------------------------------------------
MTHS IN PRIOR ASSIGNMENT:                ORIG. PURPOSE:
INTERNAL LINK POSITION:                  GOAL ORIENTATION:
--------------------------------------------------------------
CLIENT'S ABILITY TO UNDERTAKE PLANNED CHANGE:
CLIENT'S WILLINGNESS TO UNDERTAKE PLANNED CHANGE:
TARGETED SUBORDINATES' NEED FOR CHANGE:
TARGETED SUBORDINATES' ABILITY TO COMMIT TO CHANGE:
TARGETED SUBORDINATES' WILLINGNESS TO COMMIT TO CHANGE:
--------------------------------------------------------------
```

The user may press the 'TAB' key or the '->' key to move and enter the
data requested.

REVIEW: --TYPE 'H' FOR HELP - 'D' TO EXIT
Entering the value ('Y', YES or 'N', NO) in this field will determine
whether other OESOs will be allowed access to this case for informational
purposes. An 'H' in this field will display the valid codes which can be
used in this data entry screen. Before the case can be entered into the
system the value must be 'Y' or 'N'.

PASSWORD:
Enter the password assigned to this case for update. This password must
be supplied by the originating OESO prior to any update access to this
case.

OESO1:
OESO2:
OESO3:
Enter the five character OESO Identifiers for any additional OESOs who may
update this case operation in the IDS system.

MTHS AS OESO:
Enter the number of months for which the primary OESO has been an OESO.
Valid responses are 1 to 99.

OPER BEGIN:
Enter the month, day, year on which the operation began (MMDDYY).

PHASE INVOLVE:
Enter the phase in which the primary OESO involvement began in this case.
Valid responses are:

                D - Data Collection;
                A - Analysis;
                F - Feedback;
                P - Planning;
                I - Implementation;
        •   E - Evaluation;
                O - Other.

MACOM:
Enter the client's MACOM. Valid responses are listed in Appendix A.

UNIT TYPE:
Enter the client's unit type. Valid responses are listed in Appendix A.

PRIM. MISSION:
Enter the primary mission of the client's organization. Valid responses
are listed in Appendix A.

MTHS IN POSITION:
Enter the length of time the OESO has been in his/her current position
prior to the start of the operation. Valid responses are 1 through 99.

ORG. LEVEL:
Enter the level of the client in his/her organization. Valid responses
are listed in Appendix A.

MTHS IN PRIOR ASSIGNMENT:
Enter the length of time the client has been in the position prior to the
start of the operation. Valid responses are 1 through 99.

ORIG. PURPOSE:
Enter the client's original purpose in wanting OE assistance. Valid res-
ponses are listed in Appendix A.

INTERNAL LINK POSITION:
Enter the client's plans to employ an internal link. The internal link
works with both the client and OESO to facilitate all aspects of the op-
eration. Valid responses are listed in Appendix A.

GOAL ORIENTATION:
Enter the extent to which the client possesses an outcome orientation in
which OE objectives are defined. Valid responses are 1 through 9 (1-Very
Low, 9-Very High).

CLIENT'S ABILITY TO UNDERTAKE PLANNED CHANGE:
Enter the extent to which the client's organization is positioned to im-
plement planned changes. Valid responses are 1 through 9 (1-Poorly Posi-
tioned, 9-Well Positioned).

CLIENT'S WILLINGNESS TO UNDERTAKE PLANNED CHANGE:
Enter the extent to which the client's organization is willing to imple-
ment planned changes. Valid responses are 1 through 9 (1-Very Unwilling,
9-Very Willing).

TARGETED SUBORDINATES' NEED FOR CHANGE:
Enter the extent to which the targeted subordinates need to implement
planned changes. Valid responses are 1 through 9 (1-Very Low Need,
9 -Very High Need).

TARGETED SUBORDINATES' ABILITY TO COMMIT TO CHANGE:
Enter the extent to which the targeted subordinates are able to implement
planned changes. Valid responses are 1 through 9 (1-Very Low Ability, 9
-Very High Ability).

TARGETED SUBORDINATES' WILLINGNESS TO COMMIT TO CHANGE:
Enter the extent to which the targeted subordinates are willing to imple-
ment planned changes. Valid responses are 1 through 9 (1-Very Unwilling,
9-Very Willing).

Once all the data has been supplied the user must press the ENTER key to
update the OEIS system with the new case.

ENTRY ASSESSMENT:

After completing the above screen of data entry, the OESO is informed of
the case number assigned by the system to the case operation. The system
then displays an assessment as to the likelihood for success of the opera-
tion. This field is supplied by the system to estimate the likelihood of
success in the use of OE. The OESO will be asked for explanation to sup-
port his/her decision to terminate or pursue this case operation. The
narrative information is collected through the use of the IBM TSO editor.
Before the user is placed into the TSO editor, the following message will
appear:

YOU WILL BE PLACED INTO THE TSO EDITOR ENVIRONMENT.
PLEASE CONSULT THE IBM TSO EDITOR MANUAL FOR ASSISTANCE.

(label of text block being updated)

The system will display the OESO rating, if applicable, and then place the
OESO in the editor environment. Below are the questions for which a nar-
rative explanation will be requested.

DO YOU HAVE ANY SPECIAL TRAINING/CREDENTIALS WHICH INFLUENCED THIS
OPERATION? (Y,N)

DESCRIPTION OF PROBLEM/ISSUES:

CLIENT GOAL ORIENTATION:

CLIENT ABILITY TO UNDERTAKE A PLANNED CHANGE:

CLIENT WILLINGNESS TO UNDERTAKE A PLANNED CHANGE:

TARGETED SUBORDINATES' NEED FOR CHANGE:

TARGETED SUBORDINATES' ABILITY TO COMMIT TO CHANGE:

TARGETED SUBORDINATES' WILLINGNESS TO COMMIT TO CHANGE:

ENTRY ASSESSMENT:

After the OESO has completed entering the data requested above, he/she
will be prompted with the statement shown below. 'Y' will return the user
to the IDS Menu and 'N' will return the user to the OEIS MAIN MENU.

**** RETURNING TO IMPLEMENTATION AND DESIGN MENU ****

DO YOU WISH TO EXECUTE ANOTHER IDS OPTION (Y,N)?

OPTION (2)   UPDATE CASE INITIATION DATA

Option (2) of the IDS Menu is used to update existing case data. Upon
selection of this option, the OESO is prompted for the case number he/she
wishes to update and the case password.

ENTER CASE NUMBER YOU WISH TO UPDATE OR '0' TO EXIT>
ENTER THE CURRENT CASE PASSWORD>

The system will then verify that the user is authorized to update the case
by checking the OESO Identifier(s), case password, and the closeout field.
The following message is displayed.

```
*****************************************.*****
* VERIFYING ACCESS RIGHTS....PLEASE WAIT *
****************************************.*****
```

If the user is authorized to update the case, and it has not been closed
out, the following update screen appears:

```
***********************************
IMPLEMENTATION DESIGN SYSTEM
***********************************
```

****   CASE INITIATION DATA UPDATE FOR CASE: (case #)   ****

MENU OPTIONS

```
 (1) UPDATE CASE INITIATION INDEX DATA
 (2) UPDATE SPECIAL TRAINING/CREDENTIALS BLOCK
 (3) UPDATE DESCRIPTION OF PROBLEM/ISSUES BLOCK
 (4) UPDATE CLIENT GOAL ORIENTATION BLOCK
 (5) UPDATE CLIENT ABILITY BLOCK
 (6) UPDATE CLIENT WILLINGNESS BLOCK
 (7) UPDATE TARGETED SUBORDINATE NEED BLOCK
 (8) UPDATE TARGETED SUBORDINATE ABILITY BLOCK
 (9) UPDATE TARGETED SUBORDINATE WILLINGNESS BLOCK
(10) UPDATE ENTRY ASSESSMENT BLOCK
 (X) EXIT CASE INITIATION UPDATE
```

        PLEASE ENTER CASE INITIATION UPDATE OPTION OR 'X' TO EXIT
        OR 'M' TO RETYPE MENU>

OPTION (1) Update Case Initiation Index Data

Selection of this option will result in the display of all existing data for this case. The OESO may move from field to field by pressing the 'TAB' or '->' key.

NOTE: Once the data has been modified, the OESO must press the ENTER or RETURN key to instruct the system to update the case.

***** CASE UPDATE / CASE: (case number) *****

PRIMARY OESO: START DATE: LAST UPDATE:
                          END DATE: PREMATURE:

CLOSED CASE: ABSTRACT: CURRENT PHASE:

CURRENTLY ACCESSIBLE BY THE FOLLOWING OESOS:

OESO1:   OESO2:   OESO3:

            YOU CANNOT CHANGE DATA DISPLAYED ON THIS SCREEN
            ENTER 'PF8' TO CONTINUE TO DETAIL DATA SCREEN

After pressing the 'PF8' key, the following information appears. Please reference the CASE INITIATION Option for label explanations (p. 7).

***** CASE INITIATION UPDATE / USER DATA *****

REVIEW: —TYPE 'D' TO EXIT
MTHS AS OESO   OPER BEGIN: PHASE INVOLVE:
MACOM: UNIT TYPE: PRIM. MISSION:
POSITION: MTHS IN POSITION: ORG. LEVEL:

MTHS IN PRIOR ASSIGNMENT: ORIG. PURPOSE:
INTERNAL LINK POSITION: GOAL ORIENTATION:

CLIENT'S ABILITY TO UNDERTAKE PLANNED CHANGE:
CLIENT'S WILLINGNESS TO UNDERTAKE PLANNED CHANGE:
TARGETED SUBORDINATES' NEED FOR CHANGE:
TARGETED SUBORDINATES' ABILITY TO COMMIT TO CHANGE:
TARGETED SUBORDINATES' WILLINGNESS TO COMMIT TO CHANGE:

ASSESSMENT VALUE:

Modifications can now be made in any of the data fields.

To exit this Update Case Initiation Data option, the user must enter 'D' in the REVIEW field and press the 'ENTER' or 'RETURN' key. The system will then display the following messages.

    **** RETURNING TO IMPLEMENTATION AND DESIGN MENU ***

DO YOU WISH TO EXECUTE ANOTHER IDS OPTION (Y,N)?

If the user responds with 'N', the system returns to the OEIS MAIN MENU, displaying the message:

    **** RETURNING TO THE OEIS SYSTEM MENU ****

DO YOU WISH TO EXECUTE ANOTHER OEIS SYSTEM OPTION?

If the user responds with 'Y', the following message is displayed:

PLEASE ENTER IDS SYSTEM OPTION OF 'X' TO EXIT
OR 'M' TO RETYPE MENU>

OPTIONS (2) - (9) Update Text Block Information

Upon selection of options 2 through 9 from the Update Case Initiation
Data Menu, the user is placed into the IBM TSO editor environment.
The current narrative data are retrieved and the following messages
appear.

. . . . .RETRIEVING CASE DATA. . . . .

If no data currently exist, the message appears as

. . . . .NO DATA CURRENTLY EXIST. . . . .

YOU WILL BE PLACED INTO THE TSO EDITOR ENVIRONMENT. PLEASE CONSULT
THE IBM TSO EDITOR MANUAL FOR ASSISTANCE. PLEASE INPUT YOUR COMMENTS
CONCERNING

                    (label of text block being updated)

E

The user may modify the existing text or input new text as appropri-
ate. Upon completion of the text modifications, the user must enter
the command 'END SAVE' and the system responds with the following
messages.

. . . . .NOW PROCESSING YOUR INSTRUCTIONS . . . PLEASE WAIT

. . . . .UPDATING CASE DIRECTORY FILE . . . PLEASE WAIT

                         (label of text block)
*** HAS BEEN UPDATED IN CASE DIRECTORY FOR CASE: (case #)

DO YOU WISH TO UPDATE ANOTHER PORTION OF CASE INITIATION
DATA FOR CASE: (case #)?

A response of 'N' will return the user to the IDS Main Menu displaying
the following message:

        **** RETURNING TO THE IMPLEMENTATION AND DESIGN MENU ****

DO YOU WISH TO EXECUTE ANOTHER IDS SYSTEM OPTION (Y,N)?

A response of 'Y' will instruct the system to prompt for which Case
Initiation Update option to invoke.

PLEASE ENTER CASE INITIATION UPDATE OPTION OR 'X' TO EXIT
OR 'M' TO RETYPE MENU>

OPTION (10) Update Entry Assessment Block

OPTION (X) Exit Case Initiation Update

This option returns the user to the IDS Main Menu, displaying the
message:

    *** RETURNING TO THE IMPLEMENTATION AND DESIGN MENU ***

OPTION (3)   UPDATE ASSESSMENT PHASE

Option (3) from the IDS Menu allows the OESO to update the Assessment
Phase of the structured case. Selection of this option results in the
following prompts:

ENTER CASE NUMBER YOU WISH TO UPDATE OR 0 TO EXIT>
ENTER THE CURRENT CASE PASSWORD>

The system will then verify that the user is authorized to update the case
by checking the OESO Identifier(s), case password, and the closeout field.
The following messages are displayed.


```
          ***************************************************
          * VERIFYING ACCESS RIGHTS....PLEASE WAIT *
          ***************************************************
```

If the user is authorized to update the case and it has not been closed
out the following update screen appears:


```
          ***************************************************
               IMPLEMENTATION AND DESIGN SYSTEM
          ***************************************************

          ***   ASSESSMENT UPDATE / CASE NUMBER: #   ***

                         MENU OPTIONS
                         ------------

              (1) ENTER/UPDATE ASSESSMENT INDEX
              (2) ENTER/UPDATE INTENSITY OF PROCESS
                      OBSERVATIONS AND INTERVIEWS
              (3) ENTER/UPDATE SPECIAL TARGET GROUPS
              (4) ENTER/UPDATE SURVEY QUESTION VALUATION
              (5) ENTER/UPDATE ROOE SUBCATEGORY RANK
              (6) ENTER/UPDATE DIAGNOSIS
              (7) ENTER/UPDATE RECEPTIVITY
              (8) ENTER/UPDATE EXPLANATIONS
              (X) EXIT ASSESSMENT PHASE UPDATE
```

PLEASE ENTER ASSESSMENT PHASE UPDATE OPTION OR 'X' TO EXIT>

OPTION (1) Enter/Update Assessment Index

Selection of this option from the Assessment Update menu will display all of the available data in the following screen. The user may move from field to field by pressing the 'TAB' or the '->' key.

```
**  UPDATE ASSESSMENT INDEX CASE: (case number)
------------------------------------------------------------------------
STARTING DATE:                                        ENDING DATE:
LAST UPDATE DATE:
------------------------------------------------------------------------
OBJECTIVES
CHANGED (Y,N):                          BECAME MORE FOCUSED (Y,N):
------------------------------------------------------------------------
FINAL PLANNING FOR IMPLEMENTATION WITH THE CLIENT
TOOK PLACE:......................................................(A,B,C):

FEEDBACK AND IMPLEMENTATION TOOK PLACE: ....................(A,B):
------------------------------------------------------------------------
DID THE DIAGNOSTIC PHASE DEFINE THE PROBLEM SUFFICIENTLY
FOR YOU TO CONTINUE TO THE NEXT PHASE?. . . . . . . . . .  (Y,N):
PROBLEMS RECOGNIZED BY LEADERSHIP?. . . . . . . . . . . .  (Y,N):
DOES LEADERSHIP DESIRE A CHANGE OR IMPROVEMENT? . . . . .  (Y,N):
DID OEIS HELP IN THE DIAGNOSTIC PHASE?. . . . . . . . . .  (Y,N):
HOW WOULD YOU RATE OVERALL RECEPTIVITY? . . . . . . . . .  (0-9):
------------------------------------------------------------------------
```

The screen requires responses using three different coding schemes. These are as follows:

FINAL PLANNING - Enter the letter that most accurately indicates when final planning with the client took place.

A   PRIOR TO FEEDBACK TO THE CLIENT.

B   AFTER FEEDBACK TO THE CLIENT BUT PRIOR TO FEEDBACK TO THE CLIENT'S SUBORDINATES

C   AFTER FEEDBACK TO THE CLIENT'S SUBORDINATES

FEEDBACK AND IMPLEMENTATION - Enter the letter that indicates when feedback and implementation took place:

A   IN ONE OR SEVERAL MEETINGS WITH THE CLIENT AND HIS/HER SUBORDINATES

B   ON DISTINCTLY DIFFERENT OCCASIONS AND SEPARATED BY PLANNING FOR THE IMPLEMENTATION

RATE OVERALL RECEPTIVITY - Enter the number (between 0-9) that best indicates the client's overall receptivity to the OE effort.

0   HOSTILE
:
5   NEUTRAL
:
9   SUPPORTIVE

When the assessment phase has been updated to the user's satisfaction, then updates can be entered into the data base by pressing the 'ENTER' key. If the responses are all valid, and they are processed correctly, the following messages will be displayed.

. . .ASSESSMENT FILE HAS BEEN UPDATED. . .

ENTER/UPDATE ANOTHER SECTION OF ASSESSMENT PHASE?

OPTION (2)   Enter/Update Intensity of Process Observations and
Interviews

Selection of this option from the Assessment Update menu allows the
user to edit the intensity of the process observations and interviews
section of the structured case. This section is oriented around the
levels in the client organization. The word "level" refers to the
horizontal level within or above the client organization. For exam-
ple, the XO or deputy and immediate staff constitutes level 1. The
one-character code used to represent these levels follows:

S	Client's Supervisor Level	5	5th Level
C	Client	6	6th Level
1	1st level	7	7th Level
2	2nd Level	8	8th Level
3	3rd Level	9	9th Level
4	4th Level		

The user has the option of obtaining a listing of levels that are
currently on the data base, and is prompted as follows:

DO YOU WANT A LIST OF EXISTING LEVELS? (Y,N)

If the user responds with a 'Y' a list of the existing levels is gen-
erated on the screen. Either a 'Y' or an 'N' gives the user the fol-
lowing option:

ENTER THE LEVEL YOU WISH TO ENTER/UPDATE DATA FOR:

Upon entering a valid level, the following screen is displayed:

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```
****** UPDATE ASSESSMENT GENERAL TARGET ******
           FOR CASE NUMBER:        LEVEL:
---------------------------------------------------------------
NUMBER OF RECORDS:                    PROCESS OBSERVATIONS:

EVENT
-----
                              INDIVIDUAL. . . . . . . . GROUP
INTERVIEW (X, BLANK)
                              COVERED . . . . . . . . . PERCENT
SURVEY
                              TIME  . . . . . . . . . . PERCENT
OBSERVATION
GROUP
INDIVIDUAL
---------------------------------------------------------------
FEEDBACK
--------
% DIRECTLY INVOLVED:              AVERAGE TIME TAKEN:
WAS ORDER GIVEN? (1-13):          WHO GAVE THE FEEDBACK (1-5):
DEGREE EXPECTATIONS MET:          DEGREE OF ACCEPTANCE:
---------------------------------------------------------------
```

The feedback section has two coding schemes. They are:

for **WAS ORDER GIVEN**

1	1st Level	8	8th Level
2	2nd Level	9	9th level
3	3rd level	10	Client's Supervisory Level
4	4th Level	11	Client
5	5th Level	12	All Client Personnel
6	6th Level	13	Specific Target Group Only
7	7th Level		

for **WHO GAVE THE FEEDBACK**

1   OESO gave all feedback
2   OESO gave feedback to work group leader, then leader gave
      feedback to subordinates
3   Trained internal organizational person(s) gave all feedback
4   Trained internal organizational person(s) gave feedback to
      workgroup leader, then leader gave feedback to subordinates.
5   Written feedback only.

When all of the responses are answered to the user's satisfaction, they can be entered into the data base by pressing the 'ENTER' key. If the responses are all valid and processed correctly, the following messages will be displayed.

. . . . EVALUATION FILE HAS BEEN UPDATED. . . . .

ENTER/UPDATE ANOTHER SECTION OF ASSESSMENT PHASE?

OPTION (3) Enter/Update Special Target Groups

Selection of this option from the Assessment Update menu allows the
user to edit the special target groups section of the structured case.
This section is oriented around the levels in the client organization.
The word "level" refers to the horizontal level within or above the
client's organization. For example, the XO or deputy and immediate
staff constitutes level 1. The one-character code used to represent
these levels follows:

S	Client's Supervisor Level	5	5th Level
C	Client	6	6th Level
1	1st level	7	7th Level
2	2nd Level	8	8th Level
3	3rd Level	9	9th Level
4	4th Level		

LIST SPECIAL TARGET GROUP NUMBERS? (Y,N)

A 'Y' response to the above prompt gets a listing of the target groups
currently maintained in the data base. Either response gets the fol-
lowing prompt:

ENTER TARGET GROUP NUMBER YOU WISH TO ENTER/UPDATE>

DO YOU WANT TO UPDATE SPECIAL TARGET DATA? (Y,N)

This prompt allows the user to either update the specific target group
numbers or go directly to the TSO editor to update the description of
the special target group. A 'Y' response to this prompt brings up the
following screen:

```
        ******  UPDATE ASSESSMENT SPECIFIC TARGET GROUP  ******
        FOR CASE NUMBER:
  LEVEL:      ENTER A ZERO HERE TO QUIT:
----------------------------------------------------------------------
SPECIAL GROUP
--------------                   TIME . . . . . . . . . . .PERCENT
OBSERVATION
GROUP
INDIVIDUAL
----------------------------------------------------------------------
```

Upon entering responses for the above questions, the user should press 'ENTER' to update the data base. The next prompt is:

DO YOU WANT TO CHANGE SPECIAL TARGET DESCRIPTION?   (Y,N)

A 'Y' response will place you in the TSO editor. The system retrieves current narrative data and the following messages appear:

. . . . RETRIEVING CASE DATA . . . .

If no data currently exist, the following message appears:

. . . . .NO DATA CURRENTLY EXIST . . . .

YOU WILL BE PLACED INTO THE TSO EDITOR ENVIRONMENT. PLEASE CONSULT THE IBM TSO EDITOR MANUAL FOR ASSISTANCE. PLEASE INPUT YOUR COMMENTS CONCERNING.

SPECIAL TARGET GROUP

E

The user may modify the existing text or input new text as appropriate. Upon completion of the text modifications the user must enter the command 'END SAVE' and the system responds with the following messages:

. . . NOW PROCESSING YOUR INSTRUCTIONS . . . . . PLEASE WAIT . . . .
. . . UPDATING CASE DIRECTORY FILE . . . . PLEASE WAIT . . . .

UPDATE ANOTHER SPECIAL TARGET GROUP? (Y,N)

DO YOU WISH TO UPDATE ANOTHER PORTION OF THE ASSESSMENT
PHASE DATA FOR CASE: (case number)?
(Y,N)

OPTION (4) Enter/Update Survey Question Valuation

Selection of this option from the Assessment Update menu allows the
user to edit the survey question valuation section of the structured
case. This section is oriented around the levels in the client's
organization. The word "level" refers to the horizontal level within
or above the client's organization. For example, the XO or deputy and
immediate staff constitute level 1. The one-character code used to
represent these levels follows:

S	Client's Supervisor Level	5	5th Level
C	Client	6	6th Level
1	1st level	7	7th Level
2	2nd Level	8	8th Level
3	3rd Level	9	9th Level
4	4th Level		

LIST SURVEY GROUP LEVELS? (Y,N)

A 'Y' response to this prompt produces a list of survey levels cur-
rently on the data base.

ENTER SURVEY GROUP LEVEL YOU WISH TO ENTER/UPDATE>

DO YOU WANT TO UPDATE ONLY LOCALLY GENERATED QUESTIONS
FOR THIS SURVEY GROUP LEVEL? (Y,N)

A negative response to the last prompt generates the following screen:

```
     ******  UPDATE ASSESSMENT SURVEY RELATED INFORMATION ******
     FOR CASE NUMBER:
LEVEL:
-----------------------------------------------------------------------
*** THE SURVEY WAS COMPOSED OF ***
     STANDARD QUESTIONS (Y,N)>
     QUESTIONS FROM QUESTION BANK (Y,N)>
     LOCALLY GENERATED QUESTIONS (Y,N)>
-----------------------------------------------------------------------
**** ENTER THE NUMBERS OF THE FIVE MOST USEFUL STANDARD QUESTIONS
***  IN PRIORITY ORDER
MOST USEFUL. . . . . . . .
2ND MOST USEFUL. . . . . .
3RD MOST USEFUL. . . . . .
4TH MOST USEFUL. . . . . .
5TH MOST USEFUL. . . . . .
-----------------------------------------------------------------------
```

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It was intended that a list of the valid standard questions would be compiled and located in Appendix B (not completed).

DO YOU WANT TO UPDATE/ENTER THE LOCALLY GENERATED QUESTIONS THAT WERE PARTICULARLY HELPFUL? (Y,N)

LIST LOCAL QUESTIONS BY RANK? (Y,N)

A 'Y' response to this prompt will generate a list of local questions currently in the data base.

ENTER THE RANK OF THE LOCAL QUESTION YOU WISH TO UPDATE/ENTER (1,2,3) ===>

The above prompt generates the following screen:


```
    ******* UPDATE ASSESSMENT LOCALLY GENERATED QUESTIONS *******
       FOR CASE NUMBER:
 QUESTION:
 ------------------------------------------------------------------
 ===>
 ===>
 ===>



 ------------------------------------------------------------------
```

Up to three lines of a locally generated question can be entered on this screen. The user can move from line to line with the 'TAB' key or the '->' key. When the locally generated question has been entered, press the 'ENTER' key to update the data base.

ENTER/UPDATE ANOTHER LOCALLY GENERATED QUESTION? (Y,N)

UPDATE ANOTHER GROUP LEVEL FOR SURVEY? (Y,N)

OPTION (5) Enter/Update ROOE (Results-Oriented OE) Subcategory Rank

Selection of this option from the Assessment Update menu allows the user to edit the ROOE subcategory rank section of the structured case.

LIST CATEGORY FOR ROOE? (Y,N)

An affirmative response to this prompt will generate a list of categories that are currently on the data base.

ENTER CATEGORY YOU WISH TO ENTER/UPDATE>

DO YOU WANT TO UPDATE THE RANK? (Y,N)
===>

```
******  UPDATE ASSESSMENT ROOES  ******
    FOR CASE NUMBER:
CATEGORY:       CATEGORY NAME:
--------------------------------------------------------------
PLEASE ENTER THE FOLLOWING VALUE FOR THE ROOE CATEGORY ROOE RANK:
--------------------------------------------------------------
```

Valid responses for ROOE codes and categories can be found in Appendix A. When the user has ranked the category, press the 'ENTER' key to update the data base.

DO YOU WANT TO CHANGE ROOE EXPLANATION?
(Y,N) ===>

An affirmative response will place the user in the TSO editor. The system retrieves current narrative data and the following messages appear:

. . . . **RETRIEVING CASE DATA** . . . .

If no data currently exist, the following message appears:

. . . . **NO DATA CURRENTLY EXIST** . . . .

YOU WILL BE PLACED INTO THE TSO EDITOR ENVIRONMENT. PLEASE CONSULT THE IBM TSO EDITOR MANUAL FOR ASSISTANCE. PLEASE INPUT YOUR COMMENTS CONCERNING

ROOE CATEGORIES

E

The user may modify the existing text or input new text as appropriate. Upon completion of the text modifications the user must enter the command 'END SAVE' and the system responds with the following messages:

. . . . NOW PROCESSING YOUR INSTRUCTIONS . . . . . PLEASE WAIT . . . .
. . . . UPDATING CASE DIRECTORY FILE . . . . PLEASE WAIT . . . .

UPDATE ANOTHER ROOE CATEGORY? (Y,N)

DO YOU WISH TO UPDATE ANOTHER PORTION OF THE ASSESSMENT
PHASE DATA FOR CASE: (case number)?
(Y,N)

OPTION (6) Enter/Update Diagnosis

Selection of this option from the Assessment Update menu allows the
user to edit the problem diagnosis section of the structured case.

LIST PROBLEM NUMBERS? (Y,N)

An affirmative response to this prompt generates a listing of the
problem numbers that are currently maintained on the data base.

ENTER THE PROBLEM NUMBER YOU WISH TO ENTER/UPDATE>


```
          ******** UPDATE ASSESSMENT PROBLEM DIAGNOSIS ********
       FOR CASE NUMBER:
     PROBLEM
     NUMBER:    NAME:
     ---------------------------------------------------------------
       PROBLEM LOCATION?. . . . . . . . . . . . . . . . . . . . .
       COMMANDER AFFECTED?. . . . . . . . . . . . . . . . . . . .
       CHAIN OF COMMAND AFFECTED? . . . . . . . . . . . . . . . .
       MISSION AFFECTED?  . . . . . . . . . . . . . . . . . . . .
       TECHNOLOGY AFFECTED? . . . . . . . . . . . . . . . . . . .
       STRUCTURE AFFECTED?  . .   . . . . . . . . . . . . . . . .
       PERSONNEL AFFECTED?. . . . . . . . . . . . . . . . . . . .
       ENVIRONMENT AFFECTED?. . . . . . . . . . . . . . . . . . .
     ---------------------------------------------------------------
```

Valid responses to these questions are 'X' (meaning ___) or blank
(meaning ___), with the exception of the PROBLEM LOCATION.

 for PROBLEM LOCATION the valid responses are

1 - MALE/FEMALE INTERFACE
2 - MILITARY ONLY
3 - CIVILIAN ONLY
4 - RACIAL/ETHNIC
5 - MILITARY/CIVILIAN INTERFACE

When the information update is completed, press the 'ENTER' key to update the data base and generate the following screen:

****** ASSESSMENT PHASE DIAGNOSIS MENU ******

SELECT THE FUNCTION YOU WISH TO PERFORM

OPTION   FUNCTION
------   --------
   1   ENTER/UPDATE DESCRIPTION OF THE PROBLEM
   2   ENTER/UPDATE PROBLEM GROUP
   3   ENTER/UPDATE PROBLEM STATUS
   4   ENTER/UPDATE ORGANIZATION COMPONENT
   X   EXIT

PLEASE ENTER THE OPTION NUMBER OR 'X' TO EXIT>

OPTION (1) Enter/Update Description of the Problem

Selection of this option from the Assessment Phase diagnosis menu
places the user in the TSO editor. The system retrieves the cur-
rent narrative data and the following messages appear:

. . . . RETRIEVING CASE DATA . . . .

If no data currently exist, the following message appears:

. . . . NO DATA CURRENTLY EXIST . . . .

YOU WILL BE PLACED INTO THE TSO EDITOR ENVIRONMENT. PLEASE CON-
SULT THE IBM TSO EDITOR MANUAL FOR ASSISTANCE. PLEASE INPUT YOUR
COMMENTS CONCERNING.

DESCRIPTION OF THE PROBLEM

E

The user may modify the existing text or input new text as appro-
priate. Upon completion of the text modifications, the user
must enter the command 'END SAVE' and the system responds with the
following messages:

. . . . NOW PROCESSING YOUR INSTRUCTIONS . . . . . PLEASE WAIT . .
. . . . UPDATING CASE DIRECTORY FILE . . . . PLEASE WAIT . .

     PLEASE ENTER THE OPTION NUMBER OR 'X' TO EXIT

DO YOU WISH TO UPDATE ANOTHER PORTION OF THE ASSESSMENT
PHASE DATA FOR CASE: (case number)?
(Y,N)

OPTION (2) Enter/Update Problem Group

Selection of this option allows the user to edit the problem group.

LIST EXISTING PROBLEM GROUP CODES? (Y,N)

An affirmative response to this prompt generates a listing of the problem groups and groups affecting the problem currently in the data base. A listing of problem group codes should be included in Appendix A.

DO YOU WANT TO ADD OR DELETE PAIR OF GROUPS?
(A,D)===>

for ADD ('A')

        ******** UPDATE ASSESSMENT GROUPS AFFECTED ********
    FOR CASE NUMBER:
PROBLEM NUMBER:

*** ADD ***

AFFECTED GROUP . . . .

GROUP CAUSING THE EFFECT . . . .

DO YOU WANT TO ADD ANOTHER? (Y,N)

DO YOU WANT TO ENTER/DELETE ANOTHER GROUP? (Y,N)

for DELETE ('D')

        ******** UPDATE ASSESSMENT GROUPS AFFECTED ********
    FOR CASE NUMBER:
PROBLEM NUMBER:

*** DELETE ***

AFFECTED GROUP . . . .

GROUP CAUSING THE EFFECT . . . .

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When the affected and effecting group codes are entered, press the
'ENTER' key to delete that pair from the data base. The next
prompt allows the user to delete another pair immediately, thus
allowing the user to batch deletions for removal in one session if
desired.

DO YOU WANT TO DELETE ANOTHER? (Y,N)

DO YOU WANT TO ENTER/DELETE ANOTHER GROUP? (Y,N)

OPTION (3) Enter/Update Problem Status

Selection of this option places the user in the TSO editor. The system retrieves current narrative data and the following messages appear:

. . . . RETRIEVING CASE DATA . . . .

If no data currently exist, the following message appears:

. . . . .NO DATA CURRENTLY EXIST . . . .

YOU WILL BE PLACED INTO THE TSO EDITOR ENVIRONMENT. PLEASE CONSULT THE IBM TSO EDITOR MANUAL FOR ASSISTANCE. PLEASE INPUT YOUR COMMENTS CONCERNING.

PROBLEM STATUS

E

The user may modify the existing text or input new text as appropriate. Upon completion of the text modifications, the user must enter the command 'END SAVE' and the system responds with the following messages:

. . . . NOW PROCESSING YOUR INSTRUCTIONS . . . . . PLEASE WAIT . .
. . . . UPDATING CASE DIRECTORY FILE . . . . PLEASE WAIT . .

PLEASE ENTER THE OPTION NUMBER OR 'X' TO EXIT

UPDATE ANOTHER PROBLEM STATUS? (Y,N)

OPTION (4) Enter/Update Organization Component

Selection of this option allows the user to edit the organization component.

LIST EXISTING ORGANIZATIONAL COMPONENTS? (Y,N)

An affirmative response to this prompt generates a listing of the organizational components currently in the data base. A listing of organizational components is included in Appendix A.

DO YOU WANT TO ADD OR DELETE A COMPONENT?
(A,D) ---->

for ADD ('A')

    * * * * UPDATE ASSESSMENT ORGANIZATIONAL COMPONENTS * * * *
          FOR CASE NUMBER:
     PROBLEM NUMBER:
----
    * * *ADD * * *

ORGANIZATIONAL COMPONENT . . . .

SUBCOMPONENT . . . .

 DO YOU WANT TO ADD ANOTHER? (Y,N)

 DO YOU WANT TO ENTER/DELETE ANOTHER GROUP? (Y,N)

for DELETE ('D')

    * * * * UPDATE ASSESSMENT ORGANIZATIONAL COMPONENTS * * * *
          FOR CASE NUMBER:
     PROBLEM NUMBER:
----
* * * DELETE * * *

ORGANIZATIONAL COMPONENT...........................

SUBCOMPONENT..............

OPTION (7) Enter/Update Receptivity

Selection of this option from the Assessment Update menu allows the user to edit the receptivity section of the structured case.

DO YOU WANT A LIST OF EXISTING CATEGORIES AND VALUES? (Y,N)

An affirmative response to this prompt generates a list of categories and values currently on the data base.

ENTER THE RECEPTIVITY CATEGORY YOU WISH TO ENTER/UPDATE...
(P,T,PC,UC,MC) --->

The RECEPTIVITY CATEGORY CODES are

P - PEOPLE
T - TIME
PC - PLANNED CRITICAL EVENTS
UC - UNPLANNED CRITICAL EVENTS
MC - MAJOR FUNCTIONAL CHANGE

Selecting one of these categories generates the following screen:

* *

ENTER THE RATING RECEPTIVITY FOR CATEGORY (category code)

VALID VALUES ARE (-2,-1,0,1,2)

RATING ==>

* *

The rating values (-2 to 2) indicate the following responses:

-2   PERCEIVED BY CLIENT AS AN OBSTACLE TO THE USE OF OE
 :
 :
 0   CLIENT VACILLATING OR NEUTRAL
 :
 :
 2   MAXIMUM SUPPORT FOR THE OE PROCESS

DO YOU WANT TO INPUT/UPDATE THE RECEPTIVITY EXPLANATION?
(Y,N) ======>

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An affirmative response to this prompt invokes the TSO editor. The system retrieves current narrative data and the following message appears:

. . . . RETRIEVING CASE DATA . . . .

If no data currently exist, the following message appears:

. . . . .NO DATA CURRENTLY EXIST . . . .

YOU WILL BE PLACED INTO THE TSO EDITOR ENVIRONMENT. PLEASE CONSULT THE IBM TSO EDITOR MANUAL FOR ASSISTANCE. PLEASE INPUT YOUR COMMENTS CONCERNING.

RECEPTIVITY RATING EXPLANATION

E

The user may modify the existing text or input new text as appropriate. Upon completion of the text modifications, the user must enter the command 'END SAVE' and the system responds with the following messages:

. . . . NOW PROCESSING YOUR INSTRUCTIONS . . . . . PLEASE WAIT . . . .
. . . . UPDATING CASE DIRECTORY FILE . . . . PLEASE WAIT . . . .

DO YOU WISH TO UPDATE ANOTHER PORTION OF THE ASSESSMENT
PHASE DATA FOR CASE (case number)?
(Y,N)

OPTION (8) Enter/Update Explanations

Selection of this option from the Assessment Update menu allows the
user to edit the problem explanation section of the structured case.

ENTER THE EXPLANATION TYPE --> (1,2,3,4,5)

The numbers referenced by this prompt are up to five user-defined
problems for which the user may write text explanations. Included in
these descriptions should be:

     a) PROBLEM/ISSUE
     b) WHO/WHAT
     c) CURRENT BEHAVIORS
     d) CURRENT HARD MEASURES (REFER TO ROOE)

The selection of one of these explanation types invokes the TSO edi-
tor. The system retrieves current narrative data and the following
messages appear:

   . . . . RETRIEVING CASE DATA . . . .

If no data currently exist, the following message appears:

   . . . . .NO DATA CURRENTLY EXIST . . . .

YOU WILL BE PLACED INTO THE TSO EDITOR ENVIRONMENT. PLEASE CONSULT
THE IBM TSO EDITOR MANUAL FOR ASSISTANCE. PLEASE INPUT YOUR COMMENTS
CONCERNING.

ASSESSMENT NARRATIVE

E

The user may modify the existing text or input new text as appropri-
ate. Upon completion of the text modifications, the user must enter
the command 'END SAVE' and the system responds with the following
messages:

   . . . . NOW PROCESSING YOUR INSTRUCTIONS . . . . . PLEASE WAIT . . . .
   . . . . UPDATING CASE DIRECTORY FILE . . . . PLEASE WAIT . . . .

DO YOU WISH TO UPDATE ANOTHER PORTION OF THE ASSESSMENT
PHASE DATA FOR CASE (case number)?
(Y,N)

OPTION (4) UPDATE PLANNING PHASE

Selection of this option from the IDS Menu allows the OESO to update the
planning phase of the structured case. Entering '4' after the IDS Menu
prompt produces the following display.

ENTER CASE NUMBER YOU WISH TO UPDATE OR 0 TO EXIT>
ENTER THE CURRENT CASE PASSWORD>

The system will then verify that the user is authorized to update the case
by checking the OESO Identifier(s), case password, and the closeout field.
The following message is displayed.

```
                    ***************************************
                    * VERIFYING ACCESS RIGHTS...PLEASE WAIT *
                    ***************************************
```

If the user is authorized to update the case and it has not been closed
out the case update screen appears:

```
                    *********************************
                    IMPLEMENTATION AND DESIGN SYSTEM
                    *********************************
                *** PLANNING UPDATE / CASE NUMBER: #  ***
                            MENU  OPTIONS:
                            ---------------

                (1)  UPDATE PLANNING PHASE INDEX
                 (2)  ENTER/UPDATE KEY CLIENT SUBORDINATE
                 (3)  ENTER/UPDATE OPPOSING GROUPS
                 (4)  ENTER/UPDATE SUPPORTING GROUPS
                 (5)  ENTER/UPDATE OUTCOMES
                 (6)  ENTER/UPDATE PLAN EXPLANATION
                 (X)  EXIT PLANNING PHASE UPDATE
```

PLEASE ENTER PLANNING PHASE UPDATE OPTION OR 'X' TO EXIT

Option (1) Enter/Update Planning Phase Index

Selection of this option from the Planning Update menu will display
all of the available case data in two screens. The user may move from
field to field by pressing the 'TAB' or the '->' key.


```
            ** PLANNING INDEX DATA UPDATE/CASE NUMBER:  (case number)
                            SCREEN 1 OF 2
    --------------------------------------------------------------------

    PLANNING PHASE STARTING DATE (MMDDYY):                  — 0 TO EXIT
    PLANNING PHASE END DATE (MMDDYY):
    PLANNING PHASE LAST UPDATE DATE:
    _____

    CLIENT'S ROLE:                  OESO'S ROLE:
  . SUBORDINATE'S ROLE

    NUMBER OF SESSIONS:
    AVERAGE LENGTH OF SESSIONS  (NEAREST 1/4 HOUR):
    THE NUMBER OF PERSONS TO BE INVOLVED IN OPERATION IMPLEMENTATION:
    _____

    LEVEL OF POTENTIAL SLACK IN CLIENT'S ORGANIZATION (H,L):
    STABILITY OF KEY IMPLEMENTING PERSONNEL IN RELATION TO THE ESTIMATED
    TIME TO INCORPORATE THE PLANNED CHANGE  (H,L):

    *********************************************************************
    ***************  PRESS PF8 TO DISPLAY NEXT SCREEN  ******************
```


The codes for the client, OESO, and subordinate roles are in Appendix
A. The POTENTIAL SLACK and STABILITY CODES are:

H - HIGH
L - LOW

When this screen is completed, pressing 'PF8' generates the next
screen.

IF YOU ASSISTED THE CLIENT IN FORMULATION OF THE OPERATION'S OBJEC-
TIVES, OR COACHED THE CLIENT AFTER HE/SHE FORMULATED THEM, DID YOU
HELP THE CLIENT CONSIDER:

    DIFFUSION? (Y,N)
    BROAD/NARROW OBJECTIVES? (Y,N)
    LONG/SHORT TERM OBJECTIVES? (Y,N)

DID YOU COACH THE CLIENT? (Y,N)

WAS AN EVALUATION PLAN AGREED UPON? (Y,N)

DID THE OEIS HELP IN THE PLANNING PHASE OF THE OPERATION? (Y,N)

****
****** PRESS 'PF7' TO DISPLAY PRIOR SCREEN OR 'ENTER' TO UPDATE ******

If the user needs to review a question on the prior screen, pressing
'PF7' will return to that screen. When the user has responded to all
of the questions, pressing the 'ENTER' key will update the database
and the following message will be displayed:

DO YOU WISH TO UPDATE ANOTHER PORTION OF THE PLANNING PHASE FOR
CASE (case number)? (Y,N)

Option (2) Enter/Update Key User Subordinate

Selection of this option from the Planning Update menu will allow the user to edit the key user subordinate section of the structured case format. Entering '2' after the Planning Update menu prompt produces the following display.

DO YOU NEED A LIST OF NUMBERS AND NAMES?

An affirmative response ('Y') will generate a listing of the subordinate numbers and names currently on the database. The subordinate numbers are user-designated numbers to be used as a short form of the client name for ease of reporting.

ENTER THE SUBORDINATE NUMBER.

DO YOU WANT TO UPDATE OR INCLUDE A KEY SUBORDINATE NAME? (Y,N)

If 'Y'

****
ENTER THE KEY SUBORDINATE NAME OR NUMBER: (key subordinate number)

=========>

****

Whether or not a key subordinate name is chosen, the following appears:

DO YOU WANT TO UPDATE KEY SUBORDINATE TEXT?
(Y,N) ===>

An affirmative response will place you in the TSO editor. The system retrieves current narrative data and the following messages appear:

.... RETRIEVING CASE DATA ....

If no data currently exist, the following message appears:

.... NO DATA CURRENTLY EXIST ....

YOU WILL BE PLACED INTO THE TSO EDITOR ENVIRONMENT. PLEASE CONSULT THE IBM TSO EDITOR MANUAL FOR ASSISTANCE. PLEASE INPUT YOUR COMMENTS CONCERNING

KEY SUBORDINATES

E

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The user may modify the existing text or input new text as appropriate. Upon completion of the text modifications, the user must enter the command 'END SAVE' and the system responds with the following messages:

. . . . NOW PROCESSING YOUR INSTRUCTIONS . . . . PLEASE WAIT . . .
. . . . UPDATING CASE DIRECTORY FILE . . . . . . PLEASE WAIT . . .

DO YOU WISH TO UPDATE ANOTHER PORTION OF THE PLANNING PHASE
FOR CASE (case number)?
(Y,N)

Option (3) Enter/Update Opposing/Non-supportive groups

Selection of this option from the Planning Update menu will allow the
user to edit the key opposing/non-supportive groups section of the
structured case format. The following message appears upon entering
'3' after the Planning Update menu prompt.

DO YOU WANT A LIST OF OPPOSING GROUPS? (Y,N)

An affirmative response 'Y' will generate a listing of the opposing/
non-supportive group numbers and names currently on the database. The
opposing/non-supportive group numbers are user-designated numbers to
be used as a short form of the client group name for ease of report-
ing.

ENTER THE OPPOSING/NON-SUPPORTIVE GROUP NUMBER TO BE CHANGED OR ADDED

The user's response to this prompt generates the following screen:

****

                OPPOSING/NON-SUPPORTIVE GROUP NUMBER ====>
                OPPOSING/NON-SUPPORTIVE GROUP NAME ======>

When the user has filled in the screen and pressed 'ENTER' the follow-
ing message appears:

DO YOU WANT TO UPDATE ANOTHER OPPOSING/NON-SUPPORTIVE GROUP (Y OR N)

Option (4) Enter/Update Supporting Group

Selection of this option from the Planning Update menu will allow the
user to edit the key supporting groups section of the structured case
format. The following message appears after entering '4' after the
Planning Update menu prompt.

DO YOU WANT A LIST OF SUPPORTING GROUPS? (Y,N)

An affirmative response ('Y') will generate a listing of the support-
ing group numbers and names currently in the database. The supporting
group numbers are user designated numbers to be used as a short form
of the client group name for ease of reporting.

ENTER THE SUPPORTING GROUP NUMBER TO BE CHANGED OR ADDED

The user's response to this prompt generates the following screen:

****

               SUPPORTING GROUP NUMBER ====>
               SUPPORTING GROUP NAME ======>

When the user has filled in the screen and pressed 'ENTER' the follow-
ing message appears:

DO YOU WANT TO UPDATE ANOTHER SUPPORTING GROUP (Y OR N)

Option (5) Enter/Update Outcomes

Selection of this option from the Planning Update menu will allow the
user to edit the outcomes section of the structured case format. The
following message appears after entering '5' after the Planning Update
menu prompt.

ENTER THE PROBLEM NUMBER YOU WANT TO EDIT>

Entering a problem number will place you in the TSO editor. The
system retrieves current narrative data and the following message
appears:

.... RETRIEVING CASE DATA ....

If no data currently exist, the following message appears:

.... NO DATA CURRENTLY EXIST ....

YOU WILL BE PLACED INTO THE TSO EDITOR ENVIRONMENT. PLEASE CONSULT
THE IBM TSO EDITOR MANUAL FOR ASSISTANCE. PLEASE INPUT YOUR COMMENTS
CONCERNING

OUTCOMES
PLEASE BE SURE TO COVER THE FOLLOWING:
1)   PROBLEM/ISSUE
2)   WHO/WHAT
3)   DESIRED BEHAVIORS
4)   DESIRED HARD OUTCOME MEASURES

E

The user may modify the existing text or input new text as appropri-
ate. Upon completion of the text modifications the user must enter
the command 'END SAVE' and the system responds with the following
messages:

..... NOW PROCESSING YOUR INSTRUCTIONS .... PLEASE WAIT .....
..... UPDATING CASE DIRECTORY FILE .... PLEASE WAIT ....

DO YOU WISH TO UPDATE ANOTHER PORTION OF THE PLANNING PHASE
FOR CASE (case number)?
(Y,N)

Option (6) Enter/Update Plan Explanation

Selection of this option from the Planning Update menu will allow the
user to edit the outcomes section of the structured case format. The
following screen appear upon entering '6' after the Planning Update
menu prompt.

****

PLEASE SELECT ONLY VALID OPTIONS FOR YOUR CASE

_____

OPTION   PLEASE DESCRIBE
------   ----------------
1   OPPOSITION TO/NON-SUPPORT FOR OPERATION
2   SUPPORT FOR OPERATION
3   CRITERIA FOR CHOSEN OBJECTIVES
4   POTENTIAL PROBLEMS FROM NOT COACHING CLIENT
5   STRUCTURE OF PLANNING/COACHING
6   WHAT BOUNDARY CHANGES WERE COACHED?
7   WHY WAS CLIENT NOT COACHED ON BOUNDARIES?
8   REASONS EVALUATION PLAN NOT AGREED UPON
9   EFFECTS OF OEIS ON PLANNING PHASE/IMPROVEMENTS?

ENTER THE OPTION NUMBER YOU WISH TO UPDATE:

****

Entering an option number from the Plan Explanations menu will place
the user in the TSO editor. The system retrieves current narrative
data and the following message appears.

              .... RETRIEVING CASE DATA ....

If no data currently exist, the following message appears:

              .... NO DATA CURRENTLY EXISTS ....

YOU WILL BE PLACED INTO THE TSO EDITOR ENVIRONMENT. PLEASE CONSULT
THE IBM TSO EDITOR MANUAL FOR ASSISTANCE. PLEASE INPUT YOUR COMMENTS
CONCERNING

(the text corresponding to the selected option number)

E

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The user may modify the existing text or input new text as appropriate. Upon completion of the text modifications the user must enter the command 'END SAVE' and the system responds with the following messages:

. . . .NOW PROCESSING YOUR INSTRUCTIONS . . .PLEASE WAIT . . .
. . . .UPDATING CASE DIRECTORY FILE . . . . .PLEASE WAIT . . .

DO YOU WISH TO UPDATE ANOTHER PORTION OF THE PLANNING PHASE
FOR CASE (case number)?
(Y,N,)

Option (5) UPDATE IMPLEMENTATION PHASE

Option 5 of the IDS Main Menu allows the OESO to input and modify data
associated with the implementation phase of the structured case.

Upon selection of this option from the IDS Menu, the system will prompt
the user for the case number and password he/she wishes to update.

ENTER CASE NUMBER YOU WISH TO UPDATE OR 0 TO EXIT >
ENTER THE CURRENT CASE PASSWORD>

The system will then verify that the user is authorized to update the case
by checking the OESO Identifier(s), case password, and the closeout field.
The following message is displayed.

```
        ************************************************
        *  VERIFYING ACCESS RIGHTS....PLEASE WAIT  *
        ************************************************
```


..... CASE DIRECTORY FILE UPDATED TO REFLECT NEW PHASE ....

```
        *******************************
        IMPLEMENTATION AND DESIGN SYSTEM
        *******************************
```

*** IMPLEMENTATION UPDATE/CASE NUMBER: (case #) ***

MENU OPTIONS
----

    (1) UPDATE IMPLEMENTATION INDEX DATA
    (2) UPDATE PROBLEM STRUCTURE EMPLOYED BLOCK
    (3) UPDATE PROBLEM DIFFUSION BLOCK
    (4) UPDATE MID-COURSE CHANGE BLOCK
    (5) UPDATE LEADERSHIP/MANAGEMENT APPROVAL BLOCK
    (7) UPDATE IMMEDIATE OUTCOMES BLOCK
    (8) UPDATE FOLLOW-UP BLOCK
    (X) EXIT IMPLEMENTATION PHASE UPDATE

PLEASE ENTER IMPLEMENTATION PHASE UPDATE OPTION OR 'X' TO EXIT OR 'M' TO
RETYPE MENU>

Option (1) Update Implementation Index Data

Selection of this option allows the OESO to input data pertaining to
the implementation phase of the operation. If there is existing data
in the system for the implementation phase the system will retrieve
the data and display it in the following screen.

**   IMPLEMENTATION INDEX DATA UPDATE/CASE NUMBER: (case #)   **

```
-----------------------------------------------------------------------
IMPLEMENTATION PHASE STARTING DATE (MMDDYY):              --0 TO EXIT
IMPLEMENTATION PHASE END DATE (MMDDYY):
IMPLEMENTATION PHASE LAST UPDATE DATE:
_____


CLIENT ROLE:


WAS A MID-COURSE CHANGE NEEDED DURING IMPLEMENTATION:
DID LEADERSHIP/MANAGEMENT APPROVE THE CHANGE:
DID THE MID-COURSE CHANGE IMPROVE THE PROCESS:
WERE ADDITIONAL OE SERVICES REQUESTED:
IF YES, WHAT IS THE CASE NUMBER:
_____

CLIENT'S GENERAL REACTION TO THE IMPLEMENTATION:
PARTICIPANTS' GENERAL REACTION TO THE IMPLEMENTATION:
NON-PARTICIPANTS' GENERAL REACTION TO THE IMPLEMENTATION:
```

The OESO may press the 'TAB' key or the '->' key to move and enter the
data requested. Once all the data have been supplied the user must
press the 'ENTER' key to update the OEIS system with the new data.

IMPLEMENTATION PHASE STARTING DATE
Enter the date that the implementation phase began. The date format
is in MMDDYY.

IMPLEMENTATION PHASE END DATE
Enter the date that the implementation phase was terminated. The date
format is MMDDYY.

IMPLEMENTATION PHASE LAST UPDATE DATE
This field is maintained by the system. It shows the date on which
the implementation phase was last updated.

CLIENT ROLE

This field identifies the client's objectives for the implementation. The client's role should be one of the following:

1 - Implementation was designed primarily to accomplish client's own objectives.

2 - Implementation was designed to accomplish client's objectives and to integrate subordinate objectives.

3 - Implementation was designed for client and subordinates to jointly identify and solve problems.

OESO'S ROLE

This field identifies the OESO's role during the implementation phase of the operation. The OESO's role should be one of the following:

1 - Primary facilitator or trainer for implementation.

2 - Only provides consultation to the client who provides facilitation, direction or training.

3 - Only provides consultation to client subordinate(s) who provides facilitation, direction or training.

4 - Primarily a process role - provide expert advice/guidance about process.

5 - Primarily a content expert role.

6 - Half process, half content role.

WAS A MID-COURSE CHANGE NEEDED DURING INPLEMENTATION

This field is used to identify a mid-course change. Valid responses are 'Y' for yes, 'N' for no.

DID LEADERSHIP/MANAGEMENT APPROVE THE CHANGE

This field is used to identify whether the leadership and/or management approved of the change. Valid responses are 'Y' for yes, 'N' for no.

DID THE MID-COURSE CHANGE IMPROVE THE PROCESS

This field is used to identify whether the change resulted in improvements in the process. Valid responses are 'Y' for yes, 'N' for no.

WERE ADDITIONAL OE SERVICES REQUESTED
This field is used to identify whether follow up services have been
requested by the OE client. Valid responses are 'Y' for yes, 'N' for
no.

IF YES, WHAT IS THE CASE NUMBER
This field identifies the case number, within the OEIS system, which
is the follow-up case operation.

CLIENT'S GENERAL REACTION TO THE IMPLEMENTATION
This field identifies the client's reaction to the implementation of
the solution. Valid responses are as follows:

        1 - Extremely Negative
        2 - Negative
        3 - Neutral
        4 - Positive
        5 - Extremely Positive
        6 - Unknown

PARTICIPANTS' GENERAL REACTION TO THE IMPLEMENTATION
This field identifies participants' reaction to the implementation of
the solution. Valid responses are as follows:

        1 - Extremely Negative
        2 - Negative
        3 - Neutral
        4 - Positive
        5 - Extremely Positive
        6 - Unknown

NON-PARTICIPANTS' GENERAL REACTION TO THE IMPLEMENTATION
This field identifies non-participants' reaction to the implementation
of the solution. Valid responses are as follows:

        1 - Extremely Negative
        2 - Negative
        3 - Neutral
        4 - Positive
        5 - Extremely Positive
        6 - Unknown

Options (2) - (8) Update Of Test Block Information

Upon selection of options '2' through '8', the user is prompted for the problem which is being addressed. The user is then placed into the IBM TSO editor environment. The current narrative data is retreived and the following message appears:

.... RETRIEVING CASE DATA ....

If no data currently exist, the following message appears:

.... NO DATA CURRENTLY EXIST ....

YOU WILL BE PLACED INTO THE TSO EDITOR ENVIRONMENT. PLEASE CONSULT THE IBM TSO EDITOR MANUAL FOR ASSISTANCE. PLEASE INPUT YOUR COMMENTS CONCERNING

(label of text block being updated)

E

The user may modify the existing text or input new text as appropriate. Upon completion of the text modifications the user must enter the command 'END SAVE' and the system responds with the following messages.

.... NOW PROCESSING YOUR INSTRUCTIONS .... PLEASE WAIT

.... UPDATING IMPLEMENTATION FILE..... PLEASE WAIT

(label of text block)

**★ HAS BEEN UPDATED IN INPLEMENTATION FILE FOR CASE: (case #)

DO YOU WISH TO UPDATE ANOTHER PORTION OF IMPLEMENTATION DATA
FOR CASE: (case #)?

A response of 'N' will return the user to the IDS Main Menu displaying the following message.

**** RETURNING TO THE IMPLEMENTATION AND DESIGN MENU ****

DO YOU WISH TO EXECUTE ANOTHER IDS SYSTEM OPTION (Y,N)?

A response of 'Y' will instruct the system to prompt for which implementation update option to invoke.

PLEASE ENTER IMPLEMENTATION UPDATE OPTION OR 'X' TO EXIT OR 'M' TO RETYPE MENU>

Option (X) Exit Implementation update

This option returns the user to the IDS Main Menu, displaying
the following message:

**** RETURNING TO THE IMPLEMENTATION AND DESIGN MENU ****

Option (6) - UPDATE EVALUATION PHASE

Selection of this option from the IDS Menu allows the OESO to update the evaluation phase of the structured case. Entering '6' after the IDS Menu prompt results in the following messages.

ENTER CASE NUMBER YOU WISH TO UPDATE OR 0 TO EXIT>
ENTER THE CURRENT CASE PASSWORD>

The system will then verify that the user is authorized to update the case by checking the OESO Identifier(s), case password, and the closeout field. The following message is displayed.

```
**********************************************
* VERIFYING ACCESS RIGHTS...PLEASE WAIT *
**********************************************
```

If the user is authorized to update the case and it has not been closed out, the case update screen appears:

```
*********************************
IMPLEMENTATION AND DESIGN SYSTEM
*********************************
*** EVALUATION UPDATE / CASE NUMBER:        ***
              MENU OPTIONS:
              ---------------

         (1)  ENTER/UPDATE EVALUATION INDEX
         (2)  ENTER/UPDATE EXPECTATIONS
         (3)  ENTER/UPDATE PROBLEM EXPLANATION
         (4)  ENTER/UPDATE NARRATIVE RESPONSES
         (X)  EXIT THE IDS EVALUATION SUBSYSTEM
    PLEASE ENTER EVALUATION PHASE UPDATE OPTION OR 'X' TO EXIT
```

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Option (1) Enter/Update Evaluation Index

Selection of this option from the Evaluation Update menu will display
all of the available existing evaluation data in three screens. The
user may move from field to field by pressing the 'TAB' or the '->'
key.

```
********** EVALUATION PHASE INDEX FOR CASE NUMBER #  **********
  START DATE:                              END DATE:
  LAST UPDATED:                            CONTACT DATE:
          IMPLEMENTATION COMPLETION DATE:

  ***     PLEASE ANSWER THE FOLLOWING WITH EITHER  "Y" OR  "N"

     WAS EVALUATION CONDUCTED?
     WAS THE OPERATION PREMATURELY TERMINATED?
     WAS THE TARGET CORRECT?
     WAS THE PROBLEM CORRECT?
     WAS THE STRATEGY CORRECT?
     WAS OEIS USEFUL?
     WAS THE PLAN CHANGED?
     WAS THE OE PHILOSOPHY ADOPTED?
     WERE MEASURABLE OUTCOMES IDENTIFIED?
     IF YOU HAD IT TO DO OVER AGAIN, WOULD YOU?


**************** PRESS PF8 TO DISPLAY NEXT SCREEN ******************
  **************** ENTER START DATE, 'O' TO QUIT  ****************
```

After pressing the 'PF8' key, the following screen appears with the next series of questions. If the user wants to change questions on the prior screen, 'PF7' will flip back to the prior screen.

```
******** EVALUATION PHASE INDEX FOR CASE NUMBER #      ********"

***    PLEASE ANSWER THE FOLLOWING WITH A LEVEL H, M, OR L   ***

         THE LEVEL OF CLIENT ACCEPTANCE:
         THE LEVEL OF CLIENT SUPPORT:
         THE LEVEL OF CLIENT OPPOSITION:
         THE LEVEL OF SUPERVISOR SUPPORT:


***    PLEASE ANSWER THE FOLLOWING WITH A, B, C, or D

         DO YOU PLAN TO USE OE AGAIN?:
         WILL YOU RECOMMEND OTHERS USE OE?:


************** PRESS F8 TO DISPLAY NEXT SCREEN **************
************** PRESS F7 TO DISPLAY PRIOR SCREEN **************
```

Three sets of responses are used for this screen. These response sets are explained below.

THE LEVEL OF...

H - High
M - Medium
L - Low

DO YOU PLAN TO USE OE AGAIN:

A - Using it Now
B - Yes
C - Not Sure
D - No

HOW WILL YOU RECOMMEND OTHERS USE OE:

A - Yes - recommend they use it without reservation
B - Yes - but recommend they use it cautiously
C - Yes - but recommend they use it only for special types of applications
D - No - recommend they do not use it at all

When the user has answered the questions on this screen, pressing 'PF8' will display the next screen.

********** EVALUATION PHASE INDEX FOR CASE NUMBER #   **********

    ***   PLEASE ANSWER THE FOLLOWING AS REQUESTED

    WHAT IS THE ESTIMATED COST?
    WHAT IS YOUR CONFIDENCE IN THIS COST?   (1-5):
    WHAT IS THE ESTIMATED BENEFIT AMOUNT?
    WHAT IS YOUR CONFIDENCE IN THIS AMOUNT? (1-5):
    HOW CONSTRAINED ARE YOUR ESTIMATES?   (1-5):

    HOW WOULD YOU RANK THIS CLIENT?   (1-5):

*********** PRESS F7 TO VIEW PRIOR SCREEN ************************
*********** PRESS ENTER TO INPUT DATA **************************

.

When all of the questions have been answered, they can be entered into
the data base by pressing the 'ENTER' key. If the responses are all
valid, and they are processed correctly, the following messages will
be displayed.

    ... EVALUATION FILE HAS BEEN UPDATED ...

ENTER/UPDATE ANOTHER SECTION OF EVALUATION PHASE?. ('Y'or 'N')

Option (2) Enter/Update Expectations

Selection of this option from the Evaluation Update menu allows the user to edit the expectations section of the structured case. The expectations for operations is oriented around the levels in the client organization. The word "level" refers to the horizontal level within or above the client's organization. For example, the XO or deputy and immediate staff constitute level 1. The one character code used to represent these levels follows:

S	Client's Supervisor Level	5	5th Level
U	Client	6	6th Level
1	1st Level	7	7th Level
2	2nd Level	8	8th Level
3	3rd Level	9	9th Level
4	4th Level		

The client has the option of obtaining a listing of levels that are currently on the database, and is prompted as follows upon entering '2' following the Evaluation Update Menu prompt.

DO YOU WANT A LIST OF LEVELS?

If the user responds with a 'Y' (yes) a list of the existing levels is generated on the screen. Either a 'Y' or an 'N' gives the user the following option:

ENTER THE LEVEL YOU WISH TO UPDATE OR ENTER:

Upon entering a valid level, the following screen is displayed:

******* EVALUATION PHASE EXPECTATIONS INDEX FOR CASE NUMBER # *******
LEVEL NUMBER #
*** PLEASE RATE THE FOLLOWING WITH AN INTEGER BETWEEN 1 AND 6

HOW WELL WERE EXPECTATIONS MET?
LEVEL OF AGREEMENT WITH ACTION:
LEVEL OF CONFIDENCE IN PRIOR RATING:
UNINTENDED BEHAVIOR OCCURRED:
LEVEL OF CONFIDENCE IN PRIOR RATING:
LEVEL OF UNINTENTIONAL HARD OUTCOMES:
LEVEL OF CONFIDENCE IN PRIOR RATING:
LEVEL OF IMPORTANCE OF UNINTENTIONAL OUTCOMES:
INTENTIONAL BEHAVIOR LEVEL OF ACCOMPLISHMENT:
LEVEL OF CONFIDENCE IN PRIOR RATING:
INTENTIONAL HARD OUTCOMES ACCOMPLISHED:
LEVEL OF CONFIDENCE IN PRIOR RATING:
LEVEL OF IMPORTANCE OF INTENTIONAL HARD OUTCOMES:
LEVEL OF CONFIDENCE IN PRIOR RATING:
CHANGES ATTRIBUTED TO OE PROCESS:
LEVEL OF CONFIDENCE IN PRIOR RATING:
************ PRESS ENTER TO INPUT DATA ************************"

The response set used for this screen is as follows:

1   Very Negative Response
2   Negative Response
3   Neutral Response
4   Positive Response
5   Very Positive Response
6   No Response

When the screen is completed, pressing the 'ENTER' key will update the
database. If the responses are all valid, and are processed cor-
rectly, the following messages will be displayed.

... EVALUATION FILE HAS BEEN UPDATED ...

ENTER/UPDATE ANOTHER SECTION OF EVALUATION PHASE?> ('Y' or 'N')

Option (3) Enter/Update Problem Explanation

Selection of this option from the Evaluation Update menu allows the
user to edit the problem explanations. Entering '3' after the Evalua-
tion Update menu prompt results in the following display.

DO YOU WANT A LIST OF EXISTING PROBLEMS? (Y,N)

A response of 'Y' gives the user the option of obtaining a list of
problems already on the database, or, if the user has a specific prob-
lem to update, a response of 'N' will take the user directly to the
following messages:

DO YOU WANT TO ADD (A), CHANGE (C), OR DELETE (D)? (A,C,D).
ENTER THE PROBLEM NUMBER YOU WANT TO ADD, CHANGE, OR DELETE:.

Responding to these questions will bring up one of the following
screens:

If ADD or CHANGE is selected:

********** EVALUATION PHASE CASE NUMBER # **********"
        PROBLEM NUMBER

        OUTCOME TYPE:

        ARE YOU SURE YOU WANT TO DELETE THIS PROBLEM
        NUMBER? :

****

Responding 'Y' to this will delete only the problem number and outcome
displayed. Any other response will cause no change to the data base.

After adding, changing or deleting the problem and outcome you will
be prompted with the following question:

DO YOU WANT TO UPDATE PROBLEM TEXT? (Y,N).

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An affirmative response ('Y') will place you in the TSO editor. The system retrieves current narrative data and the following message appears:

.... RETRIEVING CASE DATA ....

If no data currently exist, the following message appears:

.... NO DATA CURRENTLY EXIST ....

YOU WILL BE PLACED INTO THE TSO EDITOR ENVIRONMENT. PLEASE CONSULT THE IBM TSO EDITOR MANUAL FOR ASSISTANCE. PLEASE INPUT YOUR COMMENTS CONCERNING

(label of text block being updated)

. E

The user may modify the existing text or input new text as appropriate. Upon completion of the text modifications the user must enter the command 'END SAVE' and the system responds with the following messages:

. . . . NOW PROCESSING YOUR INSTRUCTIONS . . . PLEASE WAIT . . .
. . . . UPDATING CASE DIRECTORY FILE . . . . . PLEASE WAIT . . .

DO YOU WISH TO UPDATE ANOTHER PORTION OF THE EVALUATION PHASE DATA FOR CASE: (case number)

Option (4) Enter/Update Narrative Responses

Selection of this option from the Evaluation Update menu allows the
user to edit the problem narratives. Entering '4' after the Evalua-
tion Update menu prompt results in the following message.

LIST EXPLANATION TYPES? (Y,N)

ENTER THE EXPLANATION NUMBER YOU WANT TO PROCESS:

DO YOU WANT TO ADD OR DELETE THIS PROBLEM? (A,D)

WARNING! Selection of DELETE will delete both the problem number and
the explanation text from this phase. The user should be certain
he/she wants to delete both of these before choosing this option.

DO YOU WANT TO UPDATE PROBLEM TEXT? (Y,N).

An affirmative response 'Y' will place you in the TSO editor. The
system retrieves current narrative data and the following message
appears:

.... RETRIEVING CASE DATA ....

If no data currently exist, the following message appears:

... . NO DATA CURRENTLY EXIST ....

YOU WILL BE PLACED INTO THE TSO EDITOR ENVIRONMENT. PLEASE CONSULT
THE IBM TSO EDITOR MANUAL FOR ASSISTANCE. PLEASE INPUT YOUR COMMENTS
CONCERNING

(label of text block being updated)

E

The user may modify the existing text or input new text as appropri-
ate. Upon completion of the text modifications the user must enter
the command 'END SAVE' and the system responds with the following
messages:

. . . . NOW PROCESSING YOUR INSTRUCTIONS . . . PLEASE WAIT. . .
. . . . UPDATING CASE DIRECTORY FILE . . . . . PLEASE WAIT. . .

DO YOU WISH TO UPDATE ANOTHER PORTION OF THE EVALUATION PHASE
DATA FOR CASE: (case number)

Option (7) - CLOSE OUT

Option 7 of the IDS Main Menu allows the primary OESO to officially termi-
nate a case operation within the OEIS system. [The OESO has the option
of closing out a case operation normally (the case was terminated in nor-
mal fashion), or prematurely (the case was terminated due to atypical
circumstances)]. Once a case has been closed out, no further modifica-
tions to that case will be accepted by the OEIS system. Upon selection of
this option, the user is prompted for the case number he/she wishes to
update and the case password. Entering '7' after the IDS Menu prompt
results in the following display.

ENTER CASE NUMBER YOU WISH TO UPDATE OR 0 TO EXIT>
ENTER THE CURRENT CASE PASSWORD>

The system will then verify that the user is authorized to update the case
by checking the primary OESO Identifier, case password, and the close out
field. The following message is displayed.

```
*********************************************
*  VERIFYING ACCESS RIGHTS....PLEASE WAIT  *
*********************************************
```

It the user is not authorized to update the case the following messages
will appear. The user is then reprompted for the case number to update.

THIS CASE HAS BEEN CLOSED OUT AND MAY NOT BE MODIFIED OR YOU DO NOT HAVE
UPDATE ACCESS TO CASE: (case #)

If the user is authorized to update the case and it has not been closed
out previously, the case status screen is displayed.


```
*****************************************************************************
                     CASE STATUS / CASE NUMBER: (case #)

THE CASE DIRECTORY SHOWS THAT (last phase) WAS THE LAST PHASE UPDATED

CASE START DATE:              LAST UPDATE DATE:

ARE YOU BEGINNING THE CLOSE OUT PHASE FOR THIS CASE (Y,N):

*****************************************************************************
```

The system will retrieve all information required to be present prior to the close out of a case. If all information required for close out is not present, the system will display the warning below, and indicate the required data. The user is then returned to the IDS Main Menu.

****** WARNING ******

THERE HAS NOT BEEN A SUFFICIENT AMOUNT OF INFORMATION
ABOUT THIS CASE ENTERED INTO THE SYSTEM. YOU CANNOT
CLOSE OUT THIS CASE UNTIL THE FOLLOWING INFORMATION,
HAS BEEN SUPPLIED:

INFORMATION:	(PHASE ENTERED)
ORGANIZATION CODE-	(CASE INITIATION/CASE UPDATE)
UNIT CODE-	(CASE INITIATION/CASE UPDATE)
MACOM CODE-	(CASE INITIATION/CASE UPDATE)
MISSION CODE-	(CASE INITIATION/CASE UPDATE)

CLIENT ORGANIZATION'S OVERALL RECEPTIVITY SCORE- (ASSESSMENT PHASE)
PROBLEM TYPE CODE - (ASSESSMENT PHASE)
PROBLEM LOCATION (GROUP 1) CODE- (ASSESSMENT PHASE)
PROBLEM LOCATION (GROUP 2) CODE- (ASSESSMENT PHASE)
ORGANIZATIONAL LEVEL OF PROBLEM- (ASSESSMENT PHASE)
SUBORGANIZATIONAL LEVEL OF THE PROBLEM- (ASSESSMENT PHASE)

If the information has been supplied during the appropriate phases, the system will display summary abstract information for the case on two screens.

```
*********************************************************************
                    SUMMARY ABSTRACT INFORMATION
                     FOR CASE NUMBER (case #)
*********************************************************************
```

ORGANIZATION CODE: UNIT CODE:
MACOM CODE: MISSION CODE:
OESO ID CODE:

CLIENT ORGANIZATION'S OVERALL RECEPTIVITY SCORE:

PROBLEM TYPE CODE:
PROBLEM LOCATION (GROUP 1) CODE:
PROBLEM LOCATION (GROUP 2) CODE:
ORGANIZATIONAL LEVEL OF PROBLEM:
SUBORGANIZATIONAL LEVEL OF THE PROBLEM:

PRESS PF8 TO VIEW NEXT SCREEN

```
********************************************************************
```

PLEASE ENTER YOUR ESTIMATION OF THE SUCCESS OF THIS OPERATION USING THE
FOLLOWING GUIDELINES:

CODE	CODE DESCRIPTION
1	THE OPERATION DID NOT ACHIEVE ANY OF ITS INTENDED RESULTS
2	THE OPERATION ACHIEVED VERY FEW OF ITS INTENDED RESULTS
3	THE OPERATION ACHIEVED SOME OF ITS INTENDED RESULTS
4	THE OPERATION ACHIEVED MOST OF ITS INTENDED RESULTS
5	THE OPERATION ACHIEVED ALL OF ITS INTENDED RESULTS
.	

SUCCESS INDEX: PRESS PF7 TO VIEW PRIOR SCREEN ENTER TO
                                  CONTINUE
```
********************************************************************
```

Upon completion of the above screen, the Case Close Out Menu will be dis-
played.

                    *** IMPLEMENTATION AND DESIGN SYSTEM ***

                            CASE CLOSE OUT OPTIONS
                            ----

                        (1) CLOSE OUT CASE PREMATURELY
                        (2) CLOSE OUT CASE NORMALLY

IF YOU WISH TO CLOSE OUT YOUR CASE PREMATURELY, ENTER 1. IF YOUR CASE
CONCLUDED NORMALLY AND YOU WISH TO CLOSE IT OUT, ENTER 2 ==>

Upon selection of either option the system will update the case directory
file and display the following message.

                        .... UPDATE CASE DIRECTORY ....

If the case has been closed out previously the following error message is displayed. The user is then returned to the IDS Main Menu.

ERROR ***** YOU HAVE ALREADY CLOSED THIS CASE OUT.
        CLOSED OUT CASES CANNOT BE MODIFIED.

Upon completion of the system update, the user is prompted to supply the case abstract for this case. The system places the user into the IBM TSO editor environment, and the following screen is displayed:

PLEASE ENTER THE ABSTRACT FOR CASE NUMBER (case #)
USING THE FOLLOWING PROCEDURES:

    1. TYPE 'DEL 10' AT THE 'E' PROMPT;
    2. TYPE 'INPUT' WHEN THE 'E' PROMPT REAPPEARS;
    3. ENTER TEXT WHEN THE LINE NUMBER APPEARS;
    4. PRESS THE 'ENTER' OR 'RETURN' KEY WHEN FINISHED;
    5. TYPE 'END SAVE' AT THE 'E' PROMPT WHEN FINISHED;

PLEASE CONSULT THE TSO MANUAL (SECTION III) FOR INSTRUCTIONS ON THE USE OF THE EDITOR TO MODIFY EXISTING ABSTRACTS.

THE ABSTRACT SHOULD CONTAIN THE FOLLOWING DATA:

    1. A SUMMARY OF THE OPERATION OBJECTIVES
    2. A STATEMENT OF UNIQUE LEARNINGS FROM THE OPERATION
    3. REASON FOR PREMATURE TERMINATION (IF APPLICABLE)
    4. AN EXPLANATION FOR THE DEGREE OF SUCCESS INDEX

E

When the case abstract has been entered, the system will display the following message and the user is returned to the IDS Main Menu.

        .... UPDATING CASE ABSTRACT ... PLEASE WAIT...

        *** ABSTRACT FOR CASE NUMBER (case #) ***
        *** HAS BEEN ADDED TO THE CASE DIRECTORY ***

OPTION (8) AD HOC REPORTING

Option 8 of the IDS Main Menu allows the OESO to submit on-line inter-
active queries against the IDS system files. Upon selection of this op-
tion, the OESO may submit any valid FOCUS query request to the OEIS sys-
tem. Once this option is selected the following message will be
displayed.

```
** YOU ARE NOW IN FOCUS FOR AD HOC QUERY.  YOU MAY USE ANY **
** OF THE STANDARD FOCUS COMMANDS.  TYPE 'FIN' TO RETURN   **
** TO THE OEIS SYSTEM.                                     **
```

If the user issues a request to FOCUS not allowed in the OEIS environment
the following message will appear.

```
** USER NOT AUTHORIZED TO USE THIS COMMAND WITHIN OEIS  **
** IF YOU HAVE ANY QUESTIONS PLEASE CONTACT YOUR SYSTEM **
** ADMINISTRATOR.                                       **
```

When the user has completed his/her ad hoc session, the command FIN is
entered and the OESO is returned to the IDS Main Menu.

OPTION (9) Update Case Password/Additional OESO

Option 9 of the IDS Main Menu allows the primary OESO to modify the case
access password and the OESO Identifier(s) that may access the case for
updating.

Prior to modification of the existing information, the system will vali-
date the OESO authorization to update the case. Upon entering '9' follow-
ing the IDS Menu prompt the OESO is requested to supply the case number
and current password of the case he/she wishes to update.

ENTER CASE NUMBER YOU WISH TO UPDATE OR 0 TO EXIT>
ENTER THE CURRENT CASE PASSWORD>

If the user is authorized the system will prompt for the new case password
and each of the three OESO Identifier(s) authorized to update the case
data.

ENTER NEW CASE PASSWORD (5 CHARS. MAX)>

ARE THERE ADDITIONAL OESOS WHO SHOULD UPDATE THIS CASE (Y,N)?>

ENTER ADDITIONAL OESO IDENTIFIER 1 (5 DIGIT NUMBER)>
ENTER ADDITIONAL OESO IDENTIFIER 2 (5 DIGIT NUMBER)>
ENTER ADDITIONAL OESO IDENTIFIER 3 (5 DIGIT NUMBER)>

..... UPDATING CASE PASSWORD....PLEASE WAIT

CASE PASSWORD DATA UPDATE FOR CASE NUMBER: (case #)

**** RETURNING TO IMPLEMENTATION AND DESIGN MENU ****

If the user is not authorized to update this case, the following message
appears, and the user is reprompted for the case number and password.

ERROR - YOU DO NOT HAVE PASSWORD UPDATE RIGHTS TO CASE NUMBER (CASE #).
PASSWORD NOT CHANGED.

**** RETURNING TO IMPLEMENTATION AND DESIGN MENU ****

OPTION (10)   GENERATE REPORTS

Option 10 of the IDS Main Menu allows the user to select from among four
alternative reporting functions. When this option is entered, the fol-
lowing display appears.

```
**********************************
IMPLEMENTATION AND DESIGN SYSTEM
**********************************

         IDS REPORTS
         MENU OPTIONS
         ------------

    (1) RETRIEVE SELECTED CASES
    (2) REPORT OF OPEN CASES
    (3) REPORT OF CLOSED CASES
    (4) REPORT OF NEW CASES INITIATED
    (X) EXIT IDS REPORTING SYSTEM
```

PLEASE ENTER IDS REPORT OPTION OR 'X' TO EXIT OR 'M' TO RETYPE MENU >

OPTION (1) Retrieve Selected Cases

This option allows the user to select specific cases from the OEIS
database. The user is able to provide selection criteria for the
cases, can review abstracts of these cases, and retrieve complete
information about specific cases if desired. Entering '1' after the
Reports Menu prompt produces the following display.

CASE RETRIEVAL INSTRUCTIONS

TO RETRIEVE SELECTED CASES, YOU MUST FOLLOW THESE SIMPLE INSTRUCTIONS

1. USE TAB KEYS TO MOVE THE CURSOR TO THE FACTOR YOU WISH TO USE AS
    YOUR SELECTION CRITERION, AND ENTER THE APPROPRIATE VALUE.

2. YOU ARE NOT REQUIRED TO FILL IN ALL REQUESTED VALUES FOR PERFORM-
    ING YOUR SELECTION; SIMPLY TAB OVER THE NON-APPLICABLE ITEMS.

3. YOU MAY ALTER ANY ENTRY, IF YOU CHANGE YOUR MIND, BEFORE PRESSING
    THE ENTER KEY. TO CHANGE YOUR ENTRY, TAB OVER TO THE FIELD YOU
    WISH TO CHANGE AND REENTER THE VALUE.

4. WHEN YOU ARE FINISHED, PRESS THE 'ENTER' KEY TO RETRIEVE THE DOCU-
    MENTS THAT MATCH YOUR SELECTION REQUIREMENTS.

The second screen requests information from the user regarding
selection criteria.

```
****************************************************************
*         .                                                   *
*                  IDS CASE RETRIEVAL SELECTION CRITERIA       *
****************************************************************

        MACOM CODE (01-23) ======>
        CLIENT ORG. CODE (01-11)=>
        UNIT CODE (01-24) ======>
        CLIENT PRIMARY
        MISSION CODE (01-10) ===>

        PROBLEM TYPE CODE (1-5) ===================>
        PROBLEM LOCATION  (GROUP 1) (01-11) ======>
        PROBLEM LOCATION  (GROUP 2) (01-11) ======>
        ORGANIZATION COMPONENT AFFECTED =========>
        ORGANIZATION COMPONENT TYPE AFFECTED =====>

        CLIENT'S OVERALL RECEPTIVITY INDEX (-2 TO 2) ==>
        OPERATION OVERALL SUCCESS INDEX (1-5) =======>


****************************************************************
```

The valid codes for each of the selection items are listed on the
screen. The user should refer to Appendix A for an explanation of the
appropriate codes.

This approach to case retrieval is essentially a trial-and-error proc-
ess. The number of selection factors provided directly impacts the
number of cases retrieved. Providing too many factors will signifi-
cantly limit the number of cases retrieved, while providing too few
factors may result in a very large number of cases retrieved. The
user may have to execute this option repeatedly, until an optimal
number of cases are retrieved.

The following message and prompt appear when the selection criteria
provided by the user resulted in no cases retrieved. This is usually
due to over-restrictive selection. The user is asked whether he
wishes to try again. If yes ('Y'), the user is returned to the case
selection screen; if no ('N'), the user is returned to the IDS Main
Menu.

YOUR SELECTION CRITERIA DID NOT MATCH ANY OF THE CASES STORED IN THE
CASE DIRECTORY. PERHAPS YOU SHOULD PROVIDE FEWER SELECTION FACTORS.

DO YOU WISH TO TRY AGAIN (Y,N) >

If the user anticipates the retrieval of an extremely large number of
cases, he/she may limit the number of cases to review by responding to
the following prompt.

IF THE SEARCH RETRIEVES A LARGE NUMBER OF RECORDS, HOW MANY WOULD YOU
WISH TO REVIEW ==>

The user enters the maximum number of cases which he/she is willing to
review. The system will then retrieve selected cases up to the number
provided by the user.

SUMMARY CASE DATA

The following listing illustrates the type of summary data printed by
the system for all cases that meet the selection criteria provided by
the user. The user is asked to note the case numbers of all cases for
which he/she wishes to view abstracts.

.

SUMMARY CASE DATA

IMPORTANT

IF YOU INTEND TO REVIEW THE CASE ABSTRACTS FOR
SELECTED CASES, PLEASE JOT DOWN THE CASE NUMBERS
OF THE CASES WHOSE ABSTRACTS YOU WISH TO REVIEW.

CASE
NUMBER

          OESO IDENTIFIER:
          CLIENT MACOM:
          CLIENT ORGANIZATION LEVEL:
          CLIENT UNIT NAME:
          CLIENT MISSION:

          PROBLEM TYPE:
          PROBLEM LOCATION (GRP 1):
          PROBLEM LOCATION (GRP 2):
          ORGANIZATIONAL COMPONENT
                  OF THE PROBLEM:
          ORGANIZATIONAL COMPONENT
                  PROBLEM AREA(S):

          CLIENT'S OVERALL RECEPTIVITY TO THE OPERATION:
          OPERATION OVERALL SUCCESS INDEX:

If the user wishes to review selected abstracts, once the user has identified those cases whose abstracts are to be reviewed the following screen prompts for the case number of the first abstract to be reviewed. He/she is then asked to enter the destination for the resulting output (online or to a printer).

If the user does not wish to review any abstracts, he is routed to a prompt asking whether he wishes to review case information for entire cases.

ABSTRACT RETRIEVAL REQUEST

DO YOU WISH TO REVIEW SELECTED ABSTRACTS —>

CASE NUMBER OF SELECTED ABSTRACT —>

ENTER ONLINE IF YOU WISH TO REVIEW THE ABSTRACT AT THE TERMINAL OR OFFLINE IF YOU WANT A PRINTED COPY

ENTER DESTINATION HERE —>

When the user has selected a particular abstract for review, the IDS will display the abstract and prompt the user to determine whether additional abstracts will be reviewed.

If the user wishes to review additional abstracts, he/she is returned to the ABSTRACT RETRIEVAL REQUEST screen.

If the user does not wish to review additional abstracts, he/she is routed to a prompt asking whether he/she wishes to review case information for entire cases.

SAMPLE CASE ABSTRACT

ABSTRACT FOR
CASE NUMBER
1

THIS IS A SAMPLE ABSTRACT RETRIEVED FOR THE CASE NUMBER SPECIFIED IN THE PREVIOUS PROMPT. THIS ABSTRACT WILL CONTAIN A STATEMENT OF UNIQUE LEARNINGS FROM THE OPERATION.

DO YOU WANT TO REVIEW MORE ABSTRACTS (Y,N) —>

This message and prompt appear when the case number selected by the user does not yet have an abstract. The user is asked whether he/she wishes to review additional abstracts.

CASE NUMBER 2 DOES NOT YET HAVE AN ABSTRACT. DO YOU WISH TO REVIEW
ADDITIONAL CASE ABSTRACTS (Y,N) ==>

Having examined abstracts for selected cases, the user is now able to request complete case information. To allow this, the following display is presented.

<div align="center">

PRINTING STRUCTURED CASE FORMAT FOR ENTIRE CASES

</div>

DO YOU WISH TO RETRIEVE THE ENTIRE CASE INFORMATION
FOR SELECTED CASES (Y,N) ==>

ENTER THE CASE NUMBER YOU WISH TO RETRIEVE
CASE NUMBER ==>

ENTER THE CASE NUMBER YOU WISH TO RETRIEVE OR END TO CONTINUE
CASE NUMBER ==>

ENTER THE CASE NUMBER YOU WISH TO RETRIEVE OR END TO CONTINUE
CASE NUMBER ==>

ENTER THE CASE NUMBER YOU WISH TO RETRIEVE OR END TO CONTINUE
CASE NUMBER ==>

These prompts allow the user to select relevant cases and to print out the entire case information for these cases. The user continues to enter case numbers in response to the prompts until all case numbers have been entered. To print out the case information, the user enters 'END' in answer to the last case number prompt.

If multiple case numbers are entered, the case information will be printed in the following format:

1. Case initiation information for all selected cases;

2. Planning phase information for all cases;

3. Implementation phase information for all cases;

4. Assessment phase information for all cases; and

5. Evaluation phase information for all cases.

When reviewing the printouts, the user may find it necessary to reassemble cases by collating phase information for each case number listed in the printout.

OESOs also have the option of allowing others to review their cases during the course of an operation, or making case information unavailable until the case has been closed out. If a case selected by an OESO is not available for review, the following message will appear and the user will be returned to the prompts for PRINTING STRUCTURED CASE FORMAT FOR ENTIRE CASES.

CASE NUMBER 3 IS NOT AVAILABLE FOR REVIEW.

Options (2-4) Report Generators

Each of these options automatically generates reports as indicated.
No further explanation is needed.

OPTION (2) - Entering '2' after the Report Menu prompt generates a
report of all open cases in the OEIS data base. This report provides
case status information for all cases listed as open as of the report
request date.

OPTION (3) - Entering '3' after the Report Menu prompt generates a
report of all closed cases in the OEIS data base. This report pro-
vides case status information for all cases listed as closed as of the
report request date.

OPTION (4) - Entering '4' after the Report Menu prompt generates a
report of all cases initiated in the OEIS data base. This report pro-
vides case status information on all cases initiated as of the report
request date.

OPTION (X) - Selection of this option returns the user to the IDS Main
            Menu.

OEIS MAIN MENU - OPTION (2): SURVEY SUBSYSTEM

This chapter contains documentation to allow the user to prepare and analyze OE surveys. Such surveys are frequently used by OESOs to gather data about a current situation as well as to evaluate the relative success of an OE intervention at some time after its completion. When the user selects Option (2) from the OEIS MAIN MENU the type of terminal used must be indicated. The Survey System can be run on either a full-screen CRT or a standard hardcopy terminal. The type of prompting received will be determined by the nature of the terminal used. The prompting will appear as follows:

```
             PLEASE ENTER YOUR TERMINAL TYPE
             (T = HARDCOPY OR C = CRT) >
```

After responding to the terminal type prompt, the following menu will appear on the screen.

```
          ********************************
               SURVEY SUBSYSTEM
                 OF THE OEIS
          ********************************

                 MAIN MENU OPTIONS:
                 ------------------

          (1) CREATE A NEW SURVEY INSTRUMENT
          (2) SCORE THE RESULTS OF A SURVEY
          (3) ENTER THE SURVEY REPORTING SYSTEM
          (4) PRINT OUT AN OLD SURVEY INSTRUMENT
          (5) REPORT NORMATIVE DATA
          (6) MAINTAIN THE QUESTION POOL
          (X) RETURN TO THE OEIS MAIN MENU

      ENTER SURVEY SUBSYSTEM OPTION
      NUMBER OR 'M' TO RETYPE THE MENU.
      ENTER OPTION NUMBER>>
```

OPTION (1)   CREATE A NEW SURVEY INSTRUMENT

Selection of this option will allow the user to create a new survey instrument.

Having entered this option, the following information screen will appear.

```
****************************
    CREATE A SURVEY INSTRUMENT
****************************
```

THIS PROCEDURE WILL PROMPT YOU FOR THE INFORMATION NECESSARY TO CREATE A NEW SURVEY INSTRUMENT.   IT WILL AUTOMATICALLY INSERT THE DEMOGRAPHIC AND CORE QUESTIONS AND THEN WILL PROMPT YOU TO ADD STANDARD AND AD HOC QUESTIONS.   YOU WILL BE LIMITED TO A TOTAL OF 130 QUESTIONS.   (THIS INCLUDES THE DEMOGRAPHIC AND CORE QUESTIONS.)

TO CREATE A SURVEY INSTRUMENT YOU MUST HAVE A VALID CASE NUMBER AND A VALID OESO IDENTIFIER.   YOU WILL BE PROMPTED FOR THESE FIRST AND MAY NOT CONTINUE UNLESS THEY ARE VERIFIED.

DO YOU HAVE A VALID CASE NUMBER (Y,N) ? >>

A valid case number is required which can be associated with the survey instrument to be created. If one exists, enter a 'Y', if not, enter a 'N' and return to the Survey System Main Menu.

If a 'Y' is entered then a prompt for the case number and the OESO Identifier of the case author will appear. The prompt will appear as follows.

ENTER THE CASE NUMBER ASSOCIATED WITH THIS SURVEY >>

ENTER YOUR OESO IDENTIFIER >>

** PLEASE STANDBY ... PROCESSING YOUR SURVEY **

>

After entering this information, the system verifies that it is correct. If the combination of case number and OESO Identifier does not exist, the following message will appear.

    YOUR CASE NUMBER (12345) AND OESO IDENTIFIER (99999) DO NOT EXIST
    AS A VALID COMBINATION.

    DO YOU WISH TO RE-ENTER ? >>

To try again, respond with a 'Y' and the prompt will be repeated. If not, enter an 'N' and be returned to the Survey System Main Menu.

If the case number is correct, the prompting to create a survey will resume. The first information requested will be to enter a comment line of text. This comment line is optional and may be skipped by entering an 'N' when prompted. This line of text is for notes to be associated with the survey instrument. The prompting will appear as follows:

YOU MAY, IF YOU WISH, ENTER UP TO 1 LINE (60 CHARACTERS) OF COMMENT TEXT FOR THIS SURVEY. THIS TEXT CAN BE USED IN ANY WAY YOU CHOOSE.

DO YOU WISH TO ENTER A COMMENT ? >>

ENTER YOUR COMMENT (60 CHARACTERS) >>

The next information prompt is the MACOM code. A list of the valid codes appears in Appendix A. Enter the code for the MACOM being surveyed. The prompt will appear as follows:

ENTER MACOM CODE OF THE SURVEYED ORGANIZATION >>

** PLEASE STANDBY ... PROCESSING YOUR SURVEY **

All of the basic survey information has now been entered. The system will now create the survey instrument, assign it a unique number, and load in the demographic and core questions. When this is completed the following will appear:

```
*****************************
        ADD SURVEY QUESTIONS
*****************************
```

YOUR SURVEY NUMBER 30 HAS BEEN CREATED. IT ALREADY CONTAINS THE DEMO-
GRAPHIC AND CORE QUESTIONS WHICH ARE PART OF EVERY SURVEY CREATED. YOU
MAY NOW ADD STANDARD AND AD HOC QUESTIONS TO YOUR SURVEY STARTING WITH
QUESTION NUMBER 25.

YOU WILL BE PROMPTED AS TO WHAT TYPE OF QUESTION YOU WISH TO ADD. YOU MAY
ADD UP TO 106 MORE QUESTIONS FOR A TOTAL OF 130. PLEASE SUPPLY THE RE-
QUESTED INFORMATION WHEN PROMPTED.

QUESTION TYPE	DESCRIPTION
STD	ADD A STANDARD QUESTION
AD HOC	ADD AN AD HOC QUESTION
DONE	THROUGH ADDING QUESTIONS

ENTER TYPE OF QUESTION TO ADD >>

The user can now add standard and ad hoc questions to the survey. Stan-
dard questions are questions catalogued in the question pool data base.
They may be selected by entering the question number under which they are
catalogued. Ad hoc questions allow the user to enter up to three
(3) lines of text to formulate his/her own questions. Please remember, ad
hoc questions must still use the two response (like-it-to-be, as-it-is)
Likert scale (1-5) as do all other questions. No text responses are per-
mitted. The prompting sequences for each type of question appear below:

Standard Questions (STD)

    ENTER THE STANDARD QUESTION NUMBER>>

    >

    ** PLEASE STANDBY ... PROCESSING YOUR SURVEY **

Ad hoc Questions (AD HOC)

ENTER TYPE OF QUESTION TO ADD >>

THIS SECTION ADDS AD HOC QUESTIONS TO YOUR SURVEY. YOU MAY HAVE UP TO
THREE (3) LINES OF TEXT PER QUESTION. IF YOUR QUESTION DOES NOT HAVE
THREE LINES, ENTER 5 BLANKS (SPACE BAR 5 TIMES) AND THEN HIT THE CARRIAGE
RETURN WHEN PROMPTED FOR THE ADDITIONAL LINES.

PLEASE ENTER LINE ONE OF YOUR QUESTION.
TEXT 1>>

PLEASE ENTER LINE TWO OF YOUR QUESTION.
TEXT 2>>

PLEASE ENTER LINE THREE OF YOUR QUESTION.
TEXT 3>>

>
ENTER TYPE OF QUESTION TO ADD >>

** PLEASE STANDBY - PROCESSING YOUR SURVEY **

>

You may add up to 106 additional questions of any mixture of the two
types. When the maximum number of questions, 130, has been reached the
system will automatically stop prompting for questions to add. If you
wish to stop before using the full 130 questions enter 'DONE' to continue
processing.

When the survey instrument is complete the following message will appear.

    ** YOUR SURVEY INSTRUMENT HAS BEEN SAVED FOR FUTURE REPRINTING **

        ** READY TO PRINT YOUR SURVEY INSTRUMENT **

        PAUSE.. PLEASE ADJUST PAPER AND ISSUE CARRIAGE RETURN

The survey instrument is now ready to be printed. Adjust the paper and
hit the RETURN key. An example survey instrument is shown in Exhibit I.
Note that the survey instrument is also saved so that it can be printed at
some later date using Option 4 (Print out an Old Survey Instrument) of the
Survey System Main Menu.

Exhibit I

PAGE 1

SURVEY INSTRUMENT NUMBER 30
CREATED ON 06/21/84

QUESTION
NUMBER

1-24 DEMOGRAPHIC AND CORE QUESTIONS

25 THE PEOPLE WHO ARE REMEMBERED IN THIS ORGANIZATION ARE CITED AS EXAMPLES OF HARD WORK OR LOYALTY OR COURAGE.

26 I EXPECT FUNDING FOR ONE OR MORE OF OUR BIGGEST PROJECTS TO BE CUT SOON.

27 THERE ARE RUMORS THAT HIGHER HEADQUARTERS IS GOING TO DEACTIVATE OUR UNIT SOON.

28 MY JOB LEAVES ME FEELING TIRED AT THE END OF THE DAY.

29 THERE IS A GOOD WORKING RELATIONSHIP BETWEEN MILITARY AND CIVILIAN PERSONNEL IN THIS UNIT.

30 THERE IS LITTLE INTERFERENCE FROM OUTSIDE UNITS IN DOING OUR WORK.

31 RULES IN THIS UNIT ARE ENFORCED.

32 THERE IS ENOUGH EMPHASIS ON COMPETITION IN THIS UNIT.

33 MY UNIT IS WILLING TO TRY NEW OR IMPROVED METHODS OF DOING WORK.

34 I AM NOT AFRAID TO MAKE AN OCCASIONAL MISTAKE, EXCEPT WHEN OTHERS ARE WATCHING OVER MY SHOULDERS.

35 THE PEOPLE WHO ARE REMEMBERED IN THIS ORGANIZATION ARE CITED AS EXAMPLES OF HOW THEY BEAT "THE SYSTEM."

36 THIS ORGANIZATION HAS ADEQUATE MECHANISMS FOR BINDING ITSELF TOGETHER.

SURVEY INSTRUMENT NUMBER 30
CREATED ON 06/21/84

QUESTION
NUMBER
----

37   THE PEOPLE IN MY WORK GROUP HAVE HIGH STANDARDS ABOUT HOW THEY
      DO THEIR WORK.

38   THE SOLDIERS IN MY UNIT TRY TO THINK OF BETTER WAYS OF GETTING
      THE JOB DONE.

39   MY UNIT GETS TOLD ABOUT IMPORTANT EVENTS LATER THAN OTHER
      UNITS.

40   THE INFORMATION I RECEIVE DOWN THROUGH FORMAL CHANNELS IS
      GENERALLY ACCURATE.

41   I GET ALL THE INFORMATION I NEED ABOUT WHAT IS GOING ON IN
      OTHER SECTIONS OR DEPARTMENTS IN MY UNIT.

42   I HAVE ALL THE INFORMATION THAT I NEED TO DO A GOOD JOB.

43   MY IMMEDIATE SUPERVISOR HAS IDEAS THAT ARE HELPFUL TO ME AND
      MY WORK GROUP.

44   INFORMATION FLOWS EASILY ACROSS BOUNDARIES IN THIS ORGANIZA-
      TION.

45   I GET ALL THE INFORMATION I NEED ABOUT WHAT IS GOING ON IN
      OTHER SECTIONS OR DEPARTMENTS IN MY UNIT.

46   THIS IS LINE ONE OF MY AD HOC QUESTION
      THIS IS LINE TWO OF MY AD HOC QUESTION
      THIS IS LINE THREE OF MY AD HOC QUESTION

OPTION (2) SCORE THE RESULTS OF THE SURVEY

Selection of this option will allow the user to upload scored survey re-
sults from an optical mark scanner device.

The details of this portion of the User's Manual will depend on the Mark
Sensing Device ultimately procured by the Army for this project.

OPTION (3) ENTER THE SURVEY REPORTING SYSTEM

When selecting this option, the following menu will appear:

```
*****************
STANDARD REPORT
      MENU
*****************


   REPORT OPTIONS
   ───────────────

   (1) STANDARD REPORT A
   (2) STANDARD REPORT B
   (3) STANDARD REPORT C
   (4) STANDARD REPORT D
   (5) FOCUS AD HOC QUERY
   (X) EXIT THE REPORTING SYSTEM

PLEASE ENTER THE NUMBER OF YOUR
CHOICE OR 'M' TO RETYPE THE MENU.
ENTER THE NUMBER OF YOUR CHOICE>>
```

This menu offers four standard reports. In addition the user has access
to the FOCUS editor to make ad hoc queries against the survey results data
base. To use the FOCUS ad hoc query please refer to the FOCUS User's
Manual.

When you select 'X' to exit the system you will be returned to the
Survey System Main Menu.

OPTION (4) PRINT OUT AN OLD SURVEY INSTRUMENT

Selection of Option 4 allows the user to print out surveys that have been prepared in the past.

Under this option, the system will prompt for the number of the survey instrument to be reprinted. It will then ask to verify that survey number request. Once verified, the system will attempt to reprint the survey instrument. If it cannot find the requested survey, it will offer a chance to re-enter this request. If it is found, the system will output a copy of the survey instrument. The prompting sequence will appear as follows:

```
************************
REPRINT SURVEY INSTRUMENT
UTILITY
************************
```

THIS UTILITY WILL ALLOW YOU TO REPRINT A SURVEY INSTRUMENT THAT YOU HAVE PREVIOUSLY CREATED. YOU WILL BE PROMPTED FOR THE NUMBER OF THE SURVEY. YOU MUST HAVE THE SURVEY NUMBER TO REPRINT IT.

ENTER THE NUMBER OF THE SURVEY TO REPRINT>>

YOU HAVE ENTERED SURVEY NUMBER 30
IS THIS CORRECT? (Y,N) >>

> PAUSE.. PLEASE ADJUST PAPER AND ISSUE CARRIAGE RETURN

OPTION (5) REPORT NORMATIVE DATA

Selection of this option allows most users to develop reports comparing
individual survey results against the results for all surveys (regardless
of author) for the 'core' questions that appear on all surveys.

When you select this option the following menu will appear:

```
        ********************
          NORMATIVE DATABASE
          REPORTING SYSTEM
        ********************


              REPORT OPTIONS
              ──────────────

        (1) STANDARD REPORT A
        (2) STANDARD REPORT B
        (3) STANDARD REPORT C
        (4) STANDARD REPORT D
        (5) FOCUS AD HOC QUERY
        (X) EXIT THIS REPORTING SYSTEM

     ENTER NORMATIVE DATABASE REPORT OPTION
     NUMBER OR 'M' TO RETYPE THE MENU.
     ENTER OPTION NUMBER>>
```

This menu offers four standard reports as well as access to FOCUS for ad
hoc queries against the normative database. To use the FOCUS ad hoc
query, please refer to the FOCUS User's Manual.

When you select 'X' to exit the system you will return to the Survey Sys-
tem Main Menu.

OPTION (6) MAINTAIN THE QUESTION POOL
_____

When this option is selected, the following menu will appear:

```
***********************
QUESTION POOL DATABASE
   MAINTENANCE SYSTEM
***********************

      MENU OPTIONS
      _____

(1) ADD A STANDARD QUESTION
(2) MODIFY A STANDARD QUESTION
(3) ARCHIVE A STANDARD QUESTION
(4) ENTER THE REPORTING SYSTEM
(X) EXIT THIS PROCEDURE

ENTER QUESTION POOL MAINTENANCE OPTION
NUMBER OR 'M' TO RETYPE THE MENU.
```

These options may be executed in either full-screen (CRT) or hardcopy
mode. The following examples are all done using hardcopy. If accessing
the system using full-screen mode, prompts for the same data appear in
full-screen format.

OPTION (1) Add a Standard Question

When this option is selected, the following instructions will be displayed:

```
*******************************
  ADD A NEW STANDARD QUESTION
*******************************
```

THIS PROCEDURE WILL PROMPT YOU FOR THE INFORMATION NECESSARY TO ADD
A NEW STANDARD QUESTION TO THE QUESTION POOL DATABASE. PLEASE SUPPLY
ALL THE REQUESTED INFORMATION. IF THE QUESTION YOU ARE ENTERING
HAS FEWER THAN THREE LINES OF TEXT, ENTER 3 BLANKS (SPACE BAR 3 TIMES)
AND HIT THE CARRIAGE RETURN.

YOU MAY ADD AS MANY QUESTIONS AS YOU WOULD LIKE WITHOUT EXITING THIS
PROCEDURE. WHEN YOU ARE THROUGH ADDING QUESTIONS, ENTER 'END' WHEN
PROMPTED FOR THE QUESTION SOURCE TO UPDATE THE DATABASE AND EXIT THE
PROCEDURE.

Immediately after these instructions, the system will begin prompting
for the following standard question information.

Question Source: Up to 12 characters describing the source of the
question.

Scheduled Review Date: The date, usually 1 year after the date of
entering the question, that the question
should be reviewed. (MMDDYY)

Question Subject Code: The code representing the subject area of the
new question (see Appendix B).

The system will then prompt for up to three lines that represent
this new question. If the question is less than three lines enter
3 spaces and hit the ENTER key for those extra lines.

```
ENTER THE QUESTION SOURCE (MAX OF 12 CHARACTERS)=>
ENTER THE SCHEDULED REVIEW DATA (MMDDYY)>>
ENTER QUESTION SUBJECT CODE>>

ENTER TEXT OF QUESTION

LINE TEXT 1 =>
LINE TEXT 2 =>
LINE TEXT 3 =>
```

After the system accepts this input it will assign a question number
to the information and begin prompting for the next question. From
now on, the question just entered can be referenced by this number.
The number assigned will appear as follows:

YOUR QUESTION HAS BEEN ADDED TO THE DATABASE. IT HAS BEEN ASSIGNED
NUMBER 26

When there are no additional questions to enter, type 'END' when
prompted for the question source. The user will be returned to the
Question Pool Maintenance menu.

OPTION (2) - Modify a Standard Question

When this option is selected, the following instructions will be dis-
played:

```
********************
MODIFY A QUESTION
********************
```

THIS PROCEDURE WILL ALLOW YOU TO CHANGE INFORMATION RELATED TO AN
EXISTING QUESTION. YOU WILL BE FIRST PROMPTED FOR THE NUMBER OF THE
QUESTION YOU WISH TO UPDATE. THEN THE SYSTEM WILL DISPLAY THE EXIST-
ING VALUES FOR THE FIELDS YOU MAY UPDATE. AT THAT POINT YOU MAY THEN
CHANGE ANY OF THE VALUES DISPLAYED. THE SYSTEM WILL PROMPT YOU FOR
EACH OF THE FIELDS; IF YOU WISH TO CHANGE THE EXISTING VALUE SUPPLY
THE NEW VALUE AT THE PROMPT. IF YOU DO NOT WISH TO CHANGE THE VALUE
ENTER A '.' WHEN PROMPTED FOR IT.

THIS PROCEDURE ALLOWS YOU TO MODIFY AS MANY QUESTIONS AS YOU WOULD
LIKE WITHOUT EXITING THE SYSTEM. WHEN YOU ARE THROUGH MODIFYING
QUESTIONS, TYPE 'END' WHEN PROMPTED FOR THE QUESTION NUMBER YOU WOULD
LIKE TO MODIFY.

Immediately after these instructions, the system will prompt for the
number of the question to be modified. After entering this number
press RETURN, and the system will print out the information it has
recorded for that question number. If the question number cannot be
found, the system will display a message and reprompt for a new ques-
tion number. The information will be displayed as follows:

>
QUESTION NUMBER YOU WOULD LIKE TO MODIFY>>

QUESTION SOURCE   =   MICKEY
SCHEDULED REVIEW DATE =   JUL 01 85
QUESTION SUBJECT CODE =   01

TEXT OF QUESTION

LINE ONE   : THIS IS LINE ONE OF A STANDARD QUESTION
LINE TWO   : THIS IS LINE TWO OF A STANDARD QUESTION
LINE THREE : THIS IS LINE THREE OF A STANDARD QUESTION

The system will then begin prompting for changes. To change the value
of a field enter the new value when prompted and it will replace the
previous value. If no change is to be made in a field enter a '.' for
that field and it will remain unchanged. The prompt will appear as
follows:

91

```
QUESTION SOURCE=>
SCHEDULED REVIEW DATE (MMDDYY)=>
QUESTION SUBJECT CODE=>
LINE ONE OF TEXT=>
LINE TWO OF TEXT=>
LINE THREE OF TEXT=>
```

When there are no other questions to modify, type 'END' when prompted
for the Question Number to modify. The user will be returned to the
Question Pool Maintenance menu.

OPTION (3) Archive A Standard Question

When this option is selected, the following instructions will be displayed.

```
****************************
ARCHIVE A STANDARD QUESTION
****************************
```

THIS PROCEDURE ALLOWS YOU TO ARCHIVE A STANDARD QUESTION. YOU WILL BE
FIRST PROMPTED FOR THE QUESTION NUMBER. THE SYSTEM WILL THEN ASK YOU
TO VERIFY THE NUMBER YOU ENTER. A CHECK WILL BE MADE TO MAKE SURE THE
NUMBER YOU ENTER IS A STANDARD QUESTION. WHEN THIS IS CONFIRMED YOU
WILL BE NOTIFIED THAT THE QUESTION HAS BEEN ARCHIVED. THE SYSTEM
AUTOMATICALLY ENTERS THE DATE ARCHIVED INTO THE DATABASE.

Following these instructions, the system will prompt for the question
number to be archived. It will ask for confirmation of this number.
If you confirm it, the question will be archived. If an 'N' is en-
tered the archive procedure will be aborted for that question number,
and the system will ask if another question is to be archived. Re-
spond 'Y' to continue archiving questions, 'N' to return to the menu.
The entire sequence will appear as follows:

ENTER THE QUESTION NUMBER YOU WISH ARCHIVED>>

YOU HAVE ENTERED 26 :

IS THIS CORRECT? >
>

** QUESTION NUMBER 26 HAS BEEN ARCHIVED **

DO YOU WISH TO ARCHIVE ANOTHER QUESTION (Y,N)>>

OPTION (4) Enter The Reporting System

When this option is selected, the following menu will appear:

```
*************************
QUESTION POOL DATABASE
REPORTING SYSTEM
*************************

       REPORT OPTIONS
      _____

      (1) COUNT OF ACTIVE QUESTIONS
          BY TYPE OF QUESTION
      (2) TEXT OF ALL ACTIVE QUESTION POOL
          QUESTIONS (NUMERICAL ORDER)
      (3) COUNT OF INACTIVE QUESTIONS BY TYPE
          OF QUESTION
      (X) EXIT THE REPORTING OPTION
```

ENTER QUESTION POOL REPORT OPTION
NUMBER OR 'M' TO RETYPE THE MENU
ENTER OPTION NUMBER>>

Any of the three (3) reports options can be executed by entering the appropriate option number. The reports will be produced offline and can be picked up at the USAMSSA printout desk. The sequence will appear as follows:

DO YOU WISH TO SELECT ANOTHER REPORT?>>

ENTER QUESTION POOL REPORT OPTION
NUMBER OR 'M' TO RETYPE THE MENU
ENTER OPTION NUMBER>>

OPTION (X) Return to the OEIS Main Menu

When this option is selected, the user is returned to the main OEIS
environment. The user will be prompted as to whether they wish to
access any of the other OEIS menu options. If the user replies 'Y'
he/she will be prompted for the OEIS option number or offered a
chance to review the menu. If the user responds 'N' they will exit
the OEIS system.

OEIS MAIN MENU - OPTION (3): RESOURCE SYSTEM

This chapter documents the user procedures for the Resource System (RS) of the Organizational Effectiveness Information System (OEIS). The Resource System is comprised of directories: the Personnel Directory, the Library Directory, and the Event Directory.

Within each directory, the user can interact with the RS in three ways. These are:

*   Option Selection, where the user selects a processing option.

*   Option Processing, where the user actually executes a function of the RS. This option makes use of FOCUS's full screen data entry capability. To enter the data, simply use the TAB key or the '->' key to position the cursor at the appropriate data entry position. The cursor will automatically move to the next data entry position when all character positions for a particular data field have been filled.

*   Decision Points, where the user is given several options from which to choose (continue, quit, etc.).

When OPTION (3) is chosen from the OEIS MAIN MENU, the following screen is displayed:

```
********************
RESOURCE SYSTEM
********************
** MAIN DIRECTORY **

MENU OPTIONS
_____


(1) PERSONNEL DIRECTORY
(2) LIBRARY DIRECTORY
(3) EVENT DIRECTORY
(4) AD-HOC QUERY OF THE RESOURCE SYSTEM
(X) RETURN TO OEIS MAIN MENU
```

ENTER RESOURCE SYSTEM DIRECTORY OPTION NUMBER,
X TO EXIT OR M TO VIEW MENU OPTIONS >

OPTION (1) PERSONNEL DIRECTORY

The Personnel Directory contains information on persons that have skills which may be of interest to the OESO. The following information describes the functions available within the Personnel Directory. When OPTION (1) of the Resource System Menu is selected, the following screen appears.

```
***************************
       RESOURCE SYSTEM
***************************
** PERSONNEL DIRECTORY **

        MENU OPTIONS
        _____


    (1) ADD NEW PERSONNEL RESOURCE
    (2) CHANGE EXISTING PERSONNEL RECORD
    (3) GENERATE SORTED PERSONNEL LISTING
    (4) GENERATE CONFIRMATION LETTER
    (5) QUERY PERSONNEL DIRECTORY
    (X) RETURN TO RESOURCE SYSTEM DIRECTORY


ENTER PERSONNEL DIRECTORY OPTION NUMBER,

X TO EXIT OR M TO VIEW PERSONNEL DIRECTORY MENU OPTIONS >
```

Option (1) Add New Personnel Resources

Choosing this option from the Personnel Directory allows the user to
add new personnel resources to the existing data base. Entering '1'
to the Personnel Directory Menu prompt results in the display of the
following screen:

```
              ****   ADD NEW PERSONNEL RESOURCE   ****

PERSONNEL NAME:   LAST NAME           FIRST NAME          MIDDLE INITIAL
 RECORD NUMBER:                       PERSONNEL TYPE:
RANK:             GS LEVEL:           PROMOTION DATE:
SKILL 1:          SKILL 2:                   SKILL 3:
DO YOU WISH TO BE CONTACTED AS AN OE RESOURCE (Y,N):
------------------------------------------------------------------------
PROGRAM MANAGER NAME:
                  LAST NAME           FIRST NAME          MIDDLE INITIAL
COMMAND NAME:
OFFICE ID:
STREET OR INSTALLATION:
CITY:                     STATE:          ZIP CODE:
TELEPHONE NUMBER - AUTOVON:
                COMMERCIAL:
------------------------------------------------------------------------
              ****  THIS SECTION FOR OESOs ONLY  ****
           OESO ID NUMBER:              CLASS NUMBER:
MTHS. OF OE EXPERIENCE:        OESO CLASSIFICATION (A OR I):
```

This screen is used to add new personnel resource information to the
personnel directory. The data to be entered is identified below.
Please refer to Appendix C for a list of the codes and code explana-
tions required to complete this screen.

Personnel Resource Data

Personnel Name.
Enter Last Name, First Name, and Middle Initial.

Record Number:
Program generated. Do not enter.

Rank:
Enter appropriate rank code. If person is civilian, tab over to next
field.

GS Level:
Enter GS level code. If rank code was entered, this field is blank.

Promotion data:
Enter date of promotion.

Skill 1:
Enter first skill code.

Skill 2:
Enter second skill code. Tab over to next field if no second skill code.

Skill 3:
Enter third skill code. Tab over to next field if no third skill code.

Do you wish to be contacted as an OE Resource:
Enter 'Y' for yes, 'N' for no.

Program Manager Name:
Enter last name, first name, and middle initial of personnel resource's program manager.

Command Name:
Enter the Command name.

Office ID:
Enter the office ID.

Street or installation:
Enter the street address or installation name, as appropriate.

City, State, Zip:
Enter city name, state code and zip code.

Autovon:
Enter Autovon line telephone number. Leave blank if none.

Commercial:
Enter commercial telephone number. Leave blank if none.

OESO ID Number:
Enter the OESO identifier number, if the personnel resource is an OESO.

Class number:
Enter the class number of the OESO's graduating class.

MNTHS of OE Experience:
Enter the number of months (whole numbers) of OE experience of the OESO.

OESO Classification:
Enter A for active OESO, I for inactive OESO.

OPTION (2) Modify Personnel Record
_____

When the user selects Option (2) of the Personnel Directory Menu, the
following prompts will appear one line at a time.

Type 'Y' if the number is known, 'N' if the number is not known. If
you answered 'N' you will be asked to enter the person's full name.
If you answered 'Y', you will be asked to enter the record number

DO YOU KNOW THE RECORD NUMBER OF THE RECORD
YOU WISH TO MODIFY (Y,N) ? >

ENTER THE FULL NAME OF THE PERSON WHOSE
RECORD IS TO BE MODIFIED.

ENTER LAST NAME: >
ENTER FIRST NAME: >
ENTER MIDDLE INITIAL: >

When the record specified on this screen has been found, it is dis-
played in the following manner for verification by user.

RECORD NO
----
        16   NAME: STOKES   JIM   P
              RANK: 06
              GS LEVEL:
              PERSONNEL TYPE: T1
              AUTOVON PHONE: 123-4567 COMMERCIAL PHONE: (111)222-3333
              COMMAND NAME: COMMAND
              OFFICE ID: ID
              STREET OR INSTALLATION: 11 STREET NAME
              CITY: CITY   STATE: PA ZIP:

IS THE RECORD TO BE MODIFIED LISTED?

ENTER Y OR N: > Y

ENTER RECORD NUMBER OR TYPE ZERO (0) TO EXIT.

        ENTER RECORD NUMBER: > 16

The OESO should review the summary data to verify that the correct record has been found. The user should note the record number, if not previously known, of the record to be modified. This record number is used to access certain other information. If the correct record is listed enter 'Y', if an incorrect record is listed enter 'N'.

To modify a record, enter the number of the record to be modified. Type '0' if you wish to exit this procedure and return to the Personnel Directory Menu. If no records are found, or the wrong record is retrieved, you will be asked if you wish to try again. Type 'Y' if you wish to continue, 'N' if you wish to return to the Personnel Directory Menu.

When the user has indicated that the correct record has been selected for modification, all current information will appear on the screen.

```
                  ***  MODIFY PERSONNEL RECORD  ***

PERSONNEL NAME:  STOKES               ,  JIM                , F
 RECORD NUMBER:   16               PERSONNEL TYPE: T1
RANK: 06       GS LEVEL:          PROMOTION DATE: 111183
SKILL 1:  1       SKILL 2:  2          SKILL 3: 3
DO YOU WISH TO BE CONTACTED AS AN OE RESOURCE (Y,N):  Y
----------------------------------------------------------------------
 PROGRAM MANAGER NAME:  LAST             FIRST               I
COMMAND NAME:  COMMAND
OFFICE ID:  ID
STREET OR INSTALLATION:  111 STREET NAME
CITY: CITY                              STATE:  PA   ZIP CODE:
TELEPHONE NUMBER - AUTOVON:  1234567890
              COMMERCIAL:  (111)222-3333
----------------------------------------------------------------------
              ***  THIS SECTION FOR OESOS ONLY  ***
         OESO ID NUMBER:   12345      CLASS NUMBER:    1111
MTHS OF OE EXPERIENCE:    11     OESO CLASSIFICATION  (A OR I): A
```

To modify any piece of information, simply tab over to the data entry position to be modified and type in the revised information. Only two pieces of information cannot be changed. The cursor will always bypass the Personnel Name field and the Record Number field. When you have completed all modifications, press the 'ENTER' key to update the record.

OPTION (3) Generate Sorted Personnel Listing

Responses to these prompts will generate a sorted listing in the fol-
lowing format.

RECORD
NUMBER
------
    10   NAME: LINDA M COOPER
          RANK: GS LEVEL:
          PERSONNEL TYPE: OESO (T1)

          AVAILABILITY AS OE/OD RESOURCE: YES
          SKILL 1:   DATA ANALYSIS
          SKILL 2:   CONDUCT INTERVIEWS
          SKILL 3:   DATA FEEDBACK

          COMMAND:
          OFFICE IDENTIFICATION:
          STREET OR INSTALLATION:
          CITY: STATE: MD   ZIP:
          AUTOVON PHONE:
          COMMERCIAL PHONE:
          PROGRAM MANAGER:

          OESO IDENTIFIER: OESO CLASSIFICATION: ACTIVE
          CLASS NUMBER: MONTHS OF OE EXPERIENCE:

OPTION (4) Generate Confirmation Letter

Choice of Option (4) will result in the generation of the following
letter.

.

Sample Confirmation Letter

STEVE R PERKINS   06/22/84
ARTHUR YOUNG & CO.
061
1025 CONNECTICUT AVENUE
WASHINGTON DC 20036

IN ORDER TO INSURE THAT OUR RECORDS ARE UP TO DATE, WE REQUEST THAT
YOU TAKE SOME TIME TO REVIEW THE INFORMATION LISTED BELOW. PLEASE
VERIFY THAT THE DATA PROVIDED IS STILL CURRENT. MAKE ANY CHANGES NEC-
ESSARY TO CORRECT ERRONEOUS OR OUTDATED ENTRIES. YOUR COOPERATION
WILL ENABLE US TO CONTINUE TO BE SUPPORTIVE OF THE OE NETWORK BY PRO-
VIDING AN UP-TO-DATE DIRECTORY OF OE/OD RESOURCES

.

PERSONNEL NAME: PINO   G   MARINELLI
PERSONNEL TYPE: OESO (T1)
RANK: 03   GS LEVEL:
PROMOTION DATE: OCT 10 83
SKILL 1: DATA ANALYSIS
SKILL 2: CONDUCT INTERVIEWS
SKILL 3: DATA FEEDBACK
AVAILABILITY AS OF RESOURCE: Y
AUTOVON TELEPHONE NUMBER:
COMMERCIAL TELEPHONE NUMBER: (202) 828-7133
OESO ID NUMBER 12345 CLASS NUMBER: 1234
MONTHS OF OE EXPERIENCE: 12
OESO CLASSIFICATION: ACTIVE

PLEASE RETURN THIS UPDATED FORM TO: HQDA
                                       DACS-DME
                                       PENTAGON
                                       ROOM 3-D614
                                       WASHINGTON DC   20310

                                       _____
                                       SAMUEL C. MORTON
                                       MAJOR   GS
                                       OEIS PROJECT MANAGER

OPTION (5) Query Personnel Directory

Option 5 of the Personnel Directory Menu allows the user to identify
OE resources who possess up to three (3) particular skill codes.
(Appendix C contains a list of valid skill codes.)

The following prompts appear when Option 5 is selected.

PLEASE ENTER THE SKILL CODES OF THE PERSONNEL YOU WISH TO DISPLAY

ENTER FIRST SKILL CODE === >
ENTER SECOND SKILL CODE === >
ENTER THIRD SKILL CODE === >

The user may enter up to three skill codes. The system will then
retrieve Personnel Resource records for OE resources that match any of
the skill codes entered.

To enter fewer than three (3) codes, press the space bar to advance
the cursor. Do not press the RETURN key or you will be reprompted for
that skill code.

When no records in the Personnel Directory match the skill codes en-
tered, the following message appears.

NO RECORDS FOUND FOR SKILL CODES 1,2,3

DO YOU WISH TO TRY AGAIN?

ENTER Y FOR YES, N FOR NO >

This means that either no one in the directory has the skills required
or the skill codes have been mistyped.

Verify that the skill codes are valid and enter 'Y' if you wish to try
again. Enter 'N' if you wish to return to the Personnel Directory
Menu.

If the search for OE resources with the selected skills is successful,
the following information is provided by the Personnel Directory.

LISTING OF OE PERSONNEL WITH SKILL CODE(S):

```
NAME:
RANK:        GS LEVEL:        PERSONNEL TYPE:
SKILL 1:
SKILL 2:
SKILL 3:
COMMAND:
OFFICE IDENTIFICATION:
STREET OR INSTALLATION:
CITY OR PORT:                        STATE:     ZIP:
AUTOVON PHONE:            COMMERCIAL PHONE:
```

This listing will appear across the screen. If the terminal is at-
tached to a printer, a Print Screen command will obtain a hardcopy of
the data listed. If the terminal is not attached to a printer, or
does not have a Print Screen option, the user may have to make notes
from the information displayed.

> NOTE: The source code for this option may be modified to
> request whether the user wishes to review the listing online
> (at the terminal) or offline, using a hardcopy listing.

OPTION (2) LIBRARY DIRECTORY

When Option 2 of the Resource System Main Directory is selected, the following screen will appear.

```
*************************
       RESOURCE SYSTEM
*************************
** LIBRARY DIRECTORY **

        MENU OPTIONS
       _____

   (1) ADD NEW DOCUMENT TO THE LIBRARY DIRECTORY
   (2) MODIFY EXISTING DOCUMENT INFORMATION
   (3) GENERATE SORTED DOCUMENT LISTING
   (4) QUERY LIBRARY DIRECTORY
   (X) RETURN TO THE RESOURCE SYSTEM DIRECTORY

ENTER TRANSACTION CODE NUMBER OR TYPE 'M' TO
DISPLAY THE LIBRARY DIRECTORY TRANSACTION MENU

LIBRARY TRANSACTION CODE NUMBER=> >
```

Option (1) Add New Document To The Library Directory

Selection of this option allows the user to add a new document to the
Library Directory or to add an abstract to a document already in the
Directory. When '1' is entered after the menu prompt, the following
screen appears.

                    *** LIBRARY DIRECTORY ***

                       DATA ENTRY OPTIONS
                    _____

                    (1) ENTER NEW DOCUMENT INFORMATION
                    (2) ADD DOCUMENT ABSTRACT
                    (X) EXIT TO LIBRARY DIRECTORY MENU

    SELECT DATA ENTRY OPTION BY ENTERING
    THE APPROPRIATE OPTION NUMBER === >

Option (1) Enter New Document Information

If Data Entry Option (1) is entered after the prompt, the following
screen appears.

*********** BEGIN DATA ENTRY WITH DOCUMENT NUMBER 9 ***********

DOCUMENT NUMBER: —— ENTER ZERO (0000) TO EXIT ——
AUTHOR LAST NAME: FIRST: INITIAL:
DOCUMENT TITLE:
YEAR PUBLISHED:
IS DOCUMENT MICROFICHED (Y,N):

DOCUMENT TYPE - [(B)OOK, (D)OCUMENT, (P)ERIODICAL]:

 ARTICLE TITLE (PERIODICALS ONLY):
 ISSUE (PERIODICALS ONLY):
 VOLUME (PERIODICALS ONLY):

      OE DESCRIPTORS   SUBJECT HEADINGS
1.   1.
2.   2.
3.   3.
4.   4.
****
                    ENTER NEW DOCUMENT
                       INFORMATION

The top line of the screen identifies the record number of the
document to be added. Enter this number at the Document Number
prompt.

                          DOCUMENT DATA

Document Number:
Enter the document number displayed in top line of the screen or
enter the number zero 'O' to exit this procedure.

Author Last Name:
Enter author's last name.

First:
Enter author's first name.

Initial:
Enter author's initial. Leave blank if no initial.

Document Title:
Enter the full document title.

                              109

Year Published:
Enter the publication date.

Is document microfiched:
Enter 'Y' if yes, 'N' if no.

Document Type:
Enter 'B' for Books, 'D' for Documents or 'P' for Periodical.

Article Title:
Article title - Leave blank if 'B' or 'D' entered above.

Issue Number:
Issue number - Leave blank if 'B' or 'D' entered above.

Volume Number:
Volume number - Leave blank if 'B' or 'D' entered above.

OE Descriptors:
Enter up to 4 OE descriptor codes. At least 1 OE descriptor must
be entered. Refer to Appendix C for a list of valid OE descriptor
codes.

Subject Headings:
Enter up to 4 subject headings codes. At least 1 subject heading
must be entered. Refer to Appendix C for a list of valid subject
heading codes.

Option (2) Add Document Abstract

To add an abstract to an already existing document, choose option
(2) of the Data Entry Option. Entering this option results in the
following prompts being displayed.


```
TO ENTER A DOCUMENT ABSTRACT, YOU MUST KNOW
THE DOCUMENT NUMBER
DO YOU KNOW THE DOCUMENT NUMBER (Y,N) ==  > y

DOCUMENT NUMBER ===  > 29
```


The record number of the document for which a new abstract is to
be added must be known.

If the user answers 'N' for no, he/she will be returned to the
Data Entry Options menu.

If the user answers 'Y' for yes, he/she will be prompted for the
document number.

The following summary table and prompts appear to verify that the
document number entered above reflects the correct document to
which an abstract is to be added.


```
       ... SEARCHING LIBRARY DIRECTORY FOR DOCUMENT NUMBER 124

>      DOCUMENT NUMBER:        0124
   AUTHOR:                 FIRST I LAST
   TITLE:                  TITLE
   DATE OF PUBLICATION:    1983
   DOCUMENT TYPE:          BOOK


IS THIS THE CORRECT DOCUMENT  (Y,N) ==  >


DO YOU WANT TO TRY AGAIN  (Y,N) ==  > y
DOCUMENT NUMBER ===  > 124
```


The user should:

1) Review the summary document information.

2) Enter 'Y' if the correct document has been found, 'N' if docu-
ment found is incorrect.

111

3) If 'N' has been entered at the previous prompt, the user will
be asked if he/she wishes to try again. Type 'Y' for yes or 'N'
for no.

4) An 'N' entered at the previous prompt causes system to leave
this option and return to the Data Entry Options Menu.

5) If the document number is incorrect and a 'Y' is entered a
reprompt for the document number for which an abstract is to be
added will appear.

Having verified that the correct document has been retrieved the
following information appears on the screen.

PLEASE ENTER THE ABSTRACT FOR DOCUMENT
USING THE FOLLOWING PROCEDURES:

       1. TYPE 'DEL 10' AT THE 'E' PROMPT (NEW ABSTRACTS ONLY);
       2. TYPE 'INPUT' WHEN THE 'E' PROMPT REAPPEARS;
       3. ENTER TEXT WHEN THE LINE NUMBER APPEARS;
       4. PRESS THE 'ENTER' OR 'RETURN' KEY WHEN FINISHED;
       5. TYPE 'END SAVE' AT THE 'E' PROMPT WHEN FINISHED;

PLEASE CONSULT THE TSO MANUAL (SECTION III) FOR INSTRUCTIONS ON
THE USE OF THE EDITOR TO MODIFY EXISTING ABSTRACTS.

This screen appears when a new abstract is to be added to the
Library Directory. Summary instructions are provided. Additional
instructions can be found in Section III of the TSO Manual. The
'E' prompt signifies that the system is ready to accept the new
document abstract. Follow the instructions to enter the abstract
and leave this option when the abstract has been entered.

Option (2) - Modify Existing Document Information

Selection of this option allows the user to modify/update either an existing document index or an existing document abstract. When a '2' is entered after the Library Directory Menu prompt, the following screen appears.

```
          ***** LIBRARY DIRECTORY *****
              UPDATE OPTIONS
          _____

          (1) MODIFY DOCUMENT INDEX DATA
          (2) MODIFY DOCUMENT ABSTRACTS

SELECT THE OPTION YOU WISH TO USE BY ENTERING THE NUMBER IN
PARENTHESES OR 'X' TO EXIT  >
```

Option (1) Modify Document Index Data

If update option (1) is selected, the following screen appears.

```
***  CURRENT DOCUMENT INFORMATION FOR DOCUMENT NUMBER    124  ***

DOCUMENT NUMBER:    124
AUTHOR LAST NAME:    LAST          FIRST:  FIRST          INITIAL:  I
DOCUMENT TITLE:    TITLE
YEAR PUBLISHED:    1983
IS DOCUMENT MICROFICHED (Y,N):  Y
--------------------------------------------------------------------
DOCUMENT TYPE [ (B)OOK,  (D)OCUMENT,  (P)ERIODICAL ]:  B

 ARTICLE TITLE (PERIODICALS ONLY):
 ISSUE (PERIODICALS ONLY):
 VOLUME (PERIODICALS ONLY):
--------------------------------------------------------------------
 OE DESCRIPTORS                        SUBJECT HEADINGS
1.    2                              1.  2
2.                                   2.
3.    2                              3.  2
4.                                   4.
********************************************************************
```

All current document information will appear on the screen. To
modify any piece of information, simply tab over to the data entry
position to be modified and type in the revised information.
Press the ENTER key when all modifications are complete.

Option (2) Modify Document Abstracts

If update option (2) is selected, the following screen appears.

IN ORDER TO MODIFY A DOCUMENT ABSTRACT, YOU MUST KNOW
THE DOCUMENT NUMBER.

DO YOU KNOW THE DOCUMENT NUMBER (Y,N) — > Y

DOCUMENT NUMBER OR ZERO (0) TO EXIT — > 1

... SEARCHING DIRECTORY FOR DOCUMENT ABSTRACT 1

>

***

PLEASE CONSULT THE TSO MANUAL (SECTION III) FOR INSTRUCTIONS
ON THE USE OF THE EDITOR TO MODIFY EXISTING ABSTRACTS.

To modify a document abstract, the record number of the document
for which the abstract is to be modified must be known. To
modify:

1) Enter 'Y' if the document number is known, 'N' if the document
number is not known.

2) If 'N' is entered this option will terminate and system will
return to the Library Directory Update menu.

3) Enter the document number or '0' to exit this option.

4) At the E prompt, type 'LIST' to list the current document
abstract. Consult Section III of the TSO manual for further
instructions on editing current information.

Option (3)   Generate Sorted Document Listing

Selection of this option allows the user to generate a document list-
ing sorted on a number of different options. When a '2' is entered
after the Library Directory Menu prompt, the following screen appears.

```
************************************
*     LIBRARY DIRECTORY      *
************************************

           DOCUMENT LISTING
           SORTING OPTIONS
         _____

         (1) AUTHOR
         (2) DOCUMENT TYPE
         (3) SUBJECT HEADING
         (4) OE DESCRIPTOR
         (X) EXIT LIBRARY DIRECTORY
```

SELECT ONE OF THE ABOVE SORTING OPTIONS
BY ENTERING THE CORRESPONDING NUMBER >

The menu provides a list of options for sorting the document listing.

Enter 1:   To list by selected author name, sorted alphabetically.

Enter 2:   To list by document type (Books, Documents and Periodicals),
           sorted alphabetically.

Enter 3:   To list by subject heading, sorted alphabetically.

Enter 4:   To list by OE descriptor, sorted alphabetically.

Enter X: To exit this menu and return to the Library Directory menu.

An example of output has been included, showing document information for 1 document, sorted alphabetically by author name (option 1).

When the request has been processed, the user is returned to this menu to continue issuing document listing requests or to exit this option.

AUTHOR: BBBB B BBBB

　　　TITLE: TITLE 2

DOCUMENT NUMBER: 0002   DOCUMENT TYPE: PERIODICAL
PUBLICATION DATE: 1984   ARTICLE TITLE: ARTICLE 2
MICROFICHED: NO   ISSUE NUMBER: 1111111111

　　　　OE   SUBJECT
　　DESCRIPTORS   HEADINGS
　　-----------   --------

.

TRANSITION   BEHAVIORAL
INTERVENTION   MATHEMATICS
LEADERSHIP ASSESSMENT   ORGANIZATION
GROUP DYNAMICS   STATISTICS

OPTION (4) Query Library Directory

This option allows the user to retrieve documents of particular interest as a function of various selection criteria. When a '4' is entered after the Library Directory Menu prompt, the following screens appear:

```
***********************************************************************
*              TO RETRIEVE SELECTED REFERENCES, YOU MUST              *
*                 FOLLOW THESE SIMPLE INSTRUCTIONS                    *
*                                                                     *
*     1.  USE THE TAB KEYS TO MOVE THE CURSOR TO THE FACTOR YOU       *
*         WISH TO USE AS YOUR SELECTION CRITERION.                    *
*                                                                     *
*     2.  YOU MAY SELECT UP TO THREE SUBJECT HEADINGS OR OE           *
*         DESCRIPTORS TO PERFORM YOUR SELECTION.                      *
*                                                                     *
*     3.  YOU ARE NOT REQUIRED TO FILL IN ALL REQUESTED VALUES        *
*         FOR PERFORMING YOUR SELECTION; SIMPLY TAB OVER THE          *
*         NON-APPLICABLE ITEMS.                                       *
*                                                                     *
*     4.  YOU MAY ALTER ANY ENTRY.  IF YOU WISH TO CHANGE YOUR        *
*         ENTRY, BEFORE PRESSING THE ENTER KEY, TAB OVER TO THE       *
*         TAB OVER TO THE FIELD YOU WISH TO CHANGE AND REENTER        *
*         THE VALUE.                                                  *
*                                                                     *
*     5.  WHEN YOU ARE FINISHED, PRESS THE ENTER KEY TO RETRIEVE      *
*         THE DOCUMENTS THAT MATCH YOUR SELECTION REQUIREMENTS.       *
***********************************************************************
```

```
***********************************************************************
*                          LIBRARY DIRECTORY                          *
***********************************************************************


              BASE YOUR QUERY ON THE SELECTION FACTORS LISTED BELOW
                   PRESS TAB KEY FOR NON-APPLICABLE FACTORS

        AUTHOR LAST NAME ==>
        DOCUMENT TITLE   ==>

                 1.  SUBJECT HEADING CODE ==>
                 2.  SUBJECT HEADING CODE ==>
                 3.  SUBJECT HEADING CODE ==>

     .           1.  OE DESCRIPTOR CODE   ==>
                 2.  OE DESCRIPTOR CODE   ==>
                 3.  OE DESCRIPTOR CODE   ==>
***********************************************************************
```

The second screen allows the user to provide a list of selection cri-
teria. These criteria can be either subject headings or OE descrip-
tors. (Refer to Appendix C for a list of valid skill codes and OE
descriptor codes.) The user need not fill in all entries. Simply
enter the information requested for the items to be selected on and
tab over irrelevant items.

Option (3) EVENT DIRECTORY
_____

The following screen appears when Option (3) is selected from the Resource
System Main Menu.

```
****************************
*      RESOURCE SYSTEM     *
****************************
**     EVENT DIRECTORY    **

          MENU OPTIONS
          _____

    (1)  ADD NEW EVENT
    (2)  QUERY EVENT DIRECTORY
    (3)  GENERATE SORTED EVENT LISTING
    (4)  RETURN TO RESOURCE SYSTEM DIRECTORY

ENTER EVENT DIRECTORY OPTION CODE NUMBER, OR TYPE
'M' TO DISPLAY MENU, 'X' TO EXIT = >
```

Option (1) Add New Event

If Option (1) of the Event Directory Menu is chosen, the following
screen appears.

                         *** ADD NEW EVENT ***

EVENT NUMBER: CALENDAR QUARTER HELD:
START DATE: END DATE:
START TIME: END TIME:

SPONSOR:
LOCATION:
CONTACT:
              LAST NAME   FIRST NAME   INITIAL
   CONTACT TELEPHONE NUMBER - AUTOVON:
                        COMMERCIAL:

COST OF EVENT:

** PRESS DOWN KEY 'PF8' TO ENTER EVENT DESCRIPTION AND ASSESSMENT **

                      *** EVENT DESCRIPTION ***

EVENT NAME:
EVENT DESCRIPTION:

VALUE OF EVENT BASED ON PRIOR ATTENDANTS' ASSESSMENT:

           ***** PRESS 'ENTER' KEY TO UPDATE EVENT DIRECTORY ******
           **** OR 'PF7' TO CORRECT ENTRIES ON PREVIOUS SCREEN ****

This screen is used to add a new event to the list of events already
contained in the Event Directory.

FIELD DESCRIPTION   EVENT DATA

Event Number: System generated, is not entered.

Calendar Quarter Held: Enter 1, 2, 3, or 4 for 1st, 2nd, 3rd or
                             4th quarter.

Start Date: Enter start date as mmddyy (e.g. 070284 for
                             July 2, 1984).

                                 120

End Date:	Enter end date as mmddyy.
Start Time:	Enter starting time (1800 for 6pm).
End Time:	Enter ending time (2100 for 9pm).
Sponsor:	Enter name of sponsoring agency.
Location:	Enter address where event will be held.
Contact Name:	Enter contact name at sponsoring agency.
Contact Autovon Phone:	Enter autovon number of contact (leave blank if not applicable).
Contact Commercial Phone:	Enter commercial number of contact.
Cost of Event:	Enter the cost of the event in whole numbers (495 for $495.00).

When all event data have been entered, press the "Screen Down" key to enter the event description.

FIELD DESCRIPTION	EVENT DESCRIPTION
Event Name:	Enter the name of the event.
Event Description:	Enter up to 4 lines of text describing the event.
Event Assessment:	Enter up to 4 lines of text describing the consensus assessment from prior attendees.

The user is prompted for the calendar quarter of events, to be reviewed.

Enter 1:   To review events held between January and March.

Enter 2:   To review events held between April and June.

Enter 3:   To review events held between July and September.

Enter 4:   To review events held between October and December.

When the calendar quarter of interest has been entered, the screen will display a list of event numbers and event names held during that quarter. An example of the display format follows.

Option (2) Query Event Directory

If Option (2) of the Event Directory Menu is chosen, the following
screen appears.

CALENDAR QUARTER REQUESTED > 1
>   PAGE   1

LIST OF EVENTS OCCURRING IN THE FIRST QUARTER OF 1984

PLEASE MAKE A NOTE OF THE EVENT NUMBER YOU ARE INTERESTED IN

***

EVENT NUMBER	NAME OF EVENT
2	
3	
4	AY OPEN HOUSE
7	
8	AY PARTY
9	

NUMBER OF EVENT YOU WISH TO REVIEW >

When all events for a given quarter have been presented, the user will
be prompted for the event number of any particular event to be re-
viewed. A sample listing is included to illustrate the information
provided on selected events.

              THIS IS THE CURRENT INFORMATION ON EVENT NUMBER 4

NAME, OR EVENT: AY OPEN HOUSE
START DATE: 01/21/84   END DATE: 01/21/84
START TIME: 1000 END TIME: 1600
EVENT SPONSOR: AY
EVENT LOCATION: WASH
CONTACT NAME: MARINELLI   PINO   G
AUTOVON TELEPHONE NUMBER:
COMMERCIAL TELEPHONE NUMBER: 828-7000
COST: $0
EVENT DESCRIPTION: RECRUITING EVENT

EVENT ASSESSMENT: GOOD

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Option (3) Generate Sorted Event Listing

If Option (3) of the Event Directory Menu is selected, the following screen appears.

> OUTPUT DESTINATION (ONLINE=TERMINAL, OFFLINE=PRINTER) > online
> PAGE   1

LIST OF OE/OD EVENTS SORTED BY EVENT NUMBER
AS OF 06/22/84

***
EVENT
NUMBER
------

1   **EVENT NAME:**   TAX SEMINAR
    QUARTER: FOURTH   **COST:** $0
    START DATE: 12/06/83   **END DATE:**   12/06/83
    START TIME: 1630   **END TIME:**   1600

    EVENT SPONSOR: ARTHUR YOUNG
    EVENT LOCATION: MAYFLOWER HOTEL WASHINGTON DC
    NAME OF CONTACT: GLORIA WILLIAMS
    AUTOVON TELEPHONE:
    COMMERCIAL TELEPHONE: (202) 828-7000

    EVENT DESCRIPTION: IN-HOUSE SEMINAR ADDRESSING POSSIBLE
TAX SAVINGS FOR AY PERSONNEL WHO HAVE BEEN WITH THE FIRM MORE THAN ONE
YEAR AND WHO ARE OVER 25 YEARS OF AGE. SOURCE OF SAVINGS IS NOT KNOWN
AT THIS WRITING.

    ASSESSMENT: THIS SEMINAR HAS BEEN HELD FOR COMMERCIAL
CLIENTS IN THE PAST AND HAS RECEIVED RAVE REVIEWS.
***

The prompt allows the user to direct the destination of the sorted
event listing.

Enter **online** to scroll through various events on the screen.

Enter **offline** to print the listing at a designated printer.

A sample listing for one event has been included to illustrate the
information contained in the sorted event listing. The listing will
be sorted by event number for each calendar quarter.

OPTION (4) AD HOC QUERY OF THE RESOURCE SYSTEM

[No information has been provided in the Manual with
regard to this option of the Resource System.]

APPENDIX A

IMPLEMENTATION AND DESIGN SYSTEM CODES

The following is a list of the valid codes used in the Implementation and
Design System.

MACOM

01	COE
02	DARCOM
03	EUSA
04	FORSCOM
05	HSC
06	HQDA
07	INSCOM
08	MDW
09	.MEPCOM
10	MILPERCEN
11	MTMC
12	MGBC
13	TAGCEN
14	TRADOC
15	USACIDC
16	USACS
17	USAFAC
18	USAREC
19	USAREUR (CBT)
20	USARJ
21	USAWC
22	USMA
23	WESTCOM
99	OTHER

PRIMARY MISSIONS

**   COMBAT   **
11   PERSONNEL ADMIN
12   TRAINING
13   OPERATIONS
14   LOGISTICS
15   INDUSTRIAL SUPPORT
16   ENGINEER SUPPORT
10   OTHER

**   COMBAT SUPPORT   **
21   PERSONNEL ADMIN
22   TRAINING
23   OPERATIONS
24   LOGISTICS
25   INDUSTRIAL SUPPORT
26   ENGINEER SUPPORT
20   OTHER

**   COMBAT SERVICES SUPPORT   **
31   PERSONNEL ADMIN
32   TRAINING
33   OPERATIONS
34   LOGISTICS
35   INDUSTRIAL SUPPORT
36   ENGINEER SUPPORT
30   OTHER

TYPE UNIT

01   ADJUTANT GENERAL
02   AIR DEFENSE ARTILLERY
03   ARMOR-HEAVY TANK
04   ARMOR-MEDIUM TANK
05   ARMOR-OTHER
06   ARTILLERY-OTHER
07   CHAPLAIN
08   CHEMICAL
09   CORPS OF ENGINEERS
10   FIELD ARTILLERY-DIRECT SUPPORT
11   FIELD ARTILLERY-GENERAL SUPPORT
12   FIELD ARTILLERY-REINFORCING

14   FINANCE
15   GENERAL STAFF
16   INFANTRY
17   MECHANIZED INFANTRY
18   JUDGE ADVOCATE GENERAL
19   MEDICAL, MS OR MEDDAC
20   MILITARY INTELLIGENCE
21   MILITARY POLICE CORPS
22   ORDINANCE
23   QUARTERMASTER
24   TRANSPORTATION
99   OTHER

ORGANIZATION LEVEL

01   DETACHMENT OR SMALLER
02   COMPANY/BATTERY/TROOP
03   BATTALION/SQUADRON
04   BRIGADE/REGIMENT
05   DIVISION
06   CORP/ARMY
07   INSTALLATION/AGENCY
08   STAFF SECTION
09   STAFF BRANCH
10   STAFF DIVISION
11   STAFF DIRECTORATE
99   OTHER

LINK POSITION
----
01 TOP MANAGEMENT
02 MIDDLE MANAGEMENT
03 LOWER LEVEL MANAGEMENT
99 OTHER

POSITIONS
----
01 COMMANDER OR AGENCY HEAD
02 STAFF CHIEF OR DIRECTOR
99 OTHER

ORIGINAL PURPOSE
----
01 TRANSITION TO CURRENT POSITION
02 GENERAL ASSESSMENT
03 .FOLLOW-UP FROM PREVIOUS OPERATION
04 TO WORK ON SPECIFIC PROBLEM/ISSUES

ROOE CATEGORIES

** MATERIAL **
01 SCORES
02 MAINTENANCE
03 LOSSES

** PERSONNEL **
04 COMPLAINTS
05 TURBULENCE
06 TEAMWORK
07 SELF IMPROVEMENT

** DOLLARS (SAVINGS) TIME **
08 CONFLICT
09 FASTER

** DECISION MAKING/COMMUNICATION **
10 CONTROL
11 INTERNAL FEEDBACK
12 COMMUNICATION
13 COMMANDER STRESS

** READINESS/JOB EFFICIENCY **
14 SCORES
15 TRAINING
16 PRODUCTION
17 WORK PROCESS
18 CLIENT

APPENDIX B: QUESTION POLL SUBJECT CODES

CODE	DESCRIPTION
01	Alcohol and Drug Abuse
02	Barracks Life (Bachelor Quarters)
03	Climate (Organization)
04	Communication Flow
05	Conflict Between Co-Workers or Superior and Subordinates
06	Coordination Between Workgroups
07	Decision Making
08	Demands (Key Activities)
09	Discipline
10 .	Equal Opportunity
11	Leadership
12	Management
13	Post Support
14	Performance Appraisals and Standards
15	Readiness
16	Recognition and Awards
17	Resources
18	Results
19	Satisfaction with the Organization
20	Supervisor Style
21	
22	
23	Training
24	Values

APPENDIX C: LISTING OF VALID RESOURCE SYSTEM CODES

This Appendix defines the coded values to be entered by users of the Resource System. It is subdivided into three sub-appendices, which reflect the codes used in each of the three Resource System directories:

- o Personal Directory
- o Document Directory
- o Event Directory

Where the codes were available, the valid code values and code explanations have been provided.

Codes values which were not available have been identified. These codes, and their respective code explanations must be developed and inserted at the appropriate data element category.

These code values should be developed in accordance with the format defined for the specific data element. The data elements and associated formats can be found in the master file descriptions which accompany this report. An index of the data element names and the file names in which they are described follow this page.

INDEX OF CODED DATA ELEMENTS
AND ASSOCIATED FILES

Directory	Data Element Coded Item	Name	File Name
Personnel	Skill Code	SKILL	DESCFIL
	Rank	RANK	RANKFIL
	GS Level	GS_LEVEL	GSFIL
	State	STATE	STAFIL
Document	OE Descriptor	OE_DESC_CODE	DESCDIR
.	Subject Heading	SUBJECT_CODE	SUBFIL

APPENDIX C1

Listing of Valid Personnel Codes

I.   **Personnel Type**

Code	Code Explanation
T1	OEC
T2	Army Researcher
T3	OE/OD Resource other than OEC
T4	OE Program Manager

II. **Skill Code** [1]/

Code	Code Explanation

III. **Rank** [2]/

Code	Code Explanation

IV. **GS Level** [3]/

Code	Code Explanation

V.   **State** [4]/

Code	Code Explanation

VI. **OEC Classification**

Code	Code Explanation

---

[1]/ Valid codes and code explanations must be inserted here when a list of OE skills has been developed.

[2]/ Valid codes and code explanations must be inserted here when a list of military rank codes and code explanations has been developed.

[3]/ Valid codes and code explanations must be inserted nere when a list of GS level codes and GS level code descriptions is developed.

[4]/ Valid codes and code explanations must be inserted here when a list of state codes and state names, including territories, is developed.

APPENDIX C-2

Listing of Valid Document Codes

I   Document Type

Code	Code Explanation
B	Book
D	Document
P	Periodical

II   OE Descriptor [1]/

Code	Code Explanation

III   Subject Headings [2]/

Code	Code Explanation

---

[1]/ Valid codes and code explanations must be inserted here when the list of subject headings has been developed.

[2]/ Valid codes and code explanations must be inserted here when the list of OE descriptors has been developed.

APPENDIX C-3

Listing of Valid Event Codes

I   Calendar Quarter Held

Code	Code Explanation
1	Events held from January to March
2	Events held from April to June
3	Events held from July to September
4	Events held from October to December